

# The CPD Fest 2020

# Six Steps to a Profitable Saleable Business

# **Presenter:**

Des O'Neill - OmniPro

Sponsored by :-



www.CPDStore.com

Core Technical Online CPD for Irish Accountants
Tax, Audit, Financial Reporting, Insolvency, Company Law, Regulation,
Management Accounting & Business Skills



#### **OmniPro Education & Training**

Main Street, Ferns, Enniscorthy, Co. Wexford 053 910 0000 www.omnipro.ie info@omnipro.ie



# **Table of Contents:**

Six Steps to a Profitable Saleable Business Presentation	1
Simplify to Scale	6
The Transformer Tool	10
The 6 Step Success Path	11
Strategy Fundamentals	12
Built to Sell 7 Step Formula	19
The Accountants Revolution Model AGF 2.0 2020	20

## www.CPDStore.com

Core Technical Online CPD for Irish Accountants
Tax, Audit, Financial Reporting, Insolvency, Company Law, Regulation,
Management Accounting & Business Skills





# Six Steps to a Profitable Saleable Business

ProfitCon – Session 1 Friday 18<sup>th</sup> of December

1

The Business of Accounting is a Simple One

- •Have a plan
- •Get good people
- •Identify what is a good customers and serve them
- •Deliver what customers want and need
- •Bill it and collect it
- •Get your people working in a structured way
- •Scale it to what you want



2

#### What do Accountants want? What do you want?

- I want to make more money
- I want to enjoy working with customers
- I want to work with people that value me and my expertise
- I want to get things right
- I want to do work that makes a difference
- I want to be there for our customers
- I want to make a difference
- I don't mind working hard but I need to feel like we are making progress
- $\bullet$  I want to have a business that is fun. There is enjoyment and a great place to work
- What is the ONE Thing you can do such that by doing it makes everything else easier or unnecessary?????

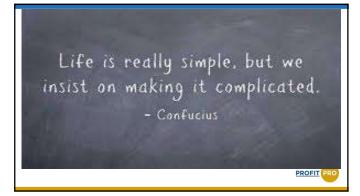


#### What do you really need?

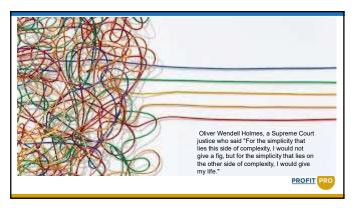
- Drive Profits
- Better Customers
- Information and knowledge that you can apply
- Reduce Stress
- Attract and Retain better team
- Smoother cashflows
- Unstuck with a Clear Step by Step Plan to follow
- More Choice and More Freedom in your business and your life
- Building your business by design



4



5



#### What are the 6 Steps to Success?

- Step 1 Your Trajectory and Your Destination
- What do you want? Not what I think you want. Not what other people have. What do you
- Step 2 Who not How
  - The answer to every problem you will ever encounter is a question Think Who
- Step 3 Nurturing Your Greatest Asset
- The value is in your customer list.
- Step 4 The 4 P's Proposition, Positioning, Product & Price
  - $\bullet$  This is a key driver of your strategy and your success
- Step 5 The Quick Win Growth Process
- · Always think simple and look for the quick wins
- Step 6 Leveraging Your Business
- $\bullet \ {\bf Automation, Systemisation, Marketing, Sales, Management}\\$



7

#### The First Step

- •What do you want?
- •What do you need to do?
- •What can you do?
- •What are you going to do?



8

#### Let's Talk Models - A Subscribed Accountancy Business

- Unlimited support No clock watching
- Tech Advisory Real time Collaboration Real Time Results There is an App for that A Transparent Model Customised Up Front Pricing Only good surprises
- Virtual Advisory and Access A success path for your customers putting them in the driving
- Focusing on what is Truly Important Discovery through a Results Conversation
- Menu priced options putting the customer in control
- The ultimate in Simplification
- Easier to use
   More useful
- The customer at the centre of everything



#### **Some Questions to Close**

- Somebody asked me a few years ago Des are you more like an employee in your own business where your time is not really your own are you a business owner who has time freedom and real control over your days.
- How would you answer that question right now if you answered with brutal honesty
- •Wear one hat in your business and find a way to let go of anything that doesn't't serve you. Is that a physical process first or a mental process in terms of changing mindset?



10

#### **Some Questions to Close**

- •How you see your business limits the possibility of the business for you.
- •How do you see your business?
- •Our own stories and beliefs determine what is possible.
- •Do you have any old stories you need to let go of and how can you create new stories starting today?
- •Or are you going to say maybe some day.
- •What is the ONE Thing I can do such that by doing it will make everything else easier or unnecessary?



11

#### Questions for you to ask Yourself

- •What is the ONE Thing I can do today such that by doing it will make everything else easier or unnecessary?
- •If we were meeting here three years from today and you were to look back over those three years to today what has to have happened during that period, both personally and professionally, for you to feel happy about your progress?



#### The ProfitPro Why

Our core belief is simply this: Accountants can and do change lives, so we get up every morning to bring them tools, advice and training so that they can build outstanding businesses for themselves and their clients too. In this way we change lives communities and our world. We would love to do that together with you



13

## Why Des O'Neill?

The Des O'Neill Why

I wake up every morning driven to realise my own true potential in life and in business. In realising my own potential I inspire & motivate others to do the same. Together we change the world.



# Simplify to Scale

# PROPOSITION SIMPLIFY Google Uber

# **STEP 1 - Easier to Use** Make the user experience easy and simple

# **Eliminate**

Remove everything except what is absolutely essential to a business owner

# **Make Intuitive and Easier**

Remove all causes of frustration and create a reporting and communication process that gives them what they want and need. Make it easier to become a customer

## Make Faster

Turn around your information and deliver the services quicker or give the customer real time data that they can use in their business

# Make Smaller / Lighter / More Portable

Distill the information they need to drive their business into a dashboard and give them flexible access

## Make Easier to Obtain

Make your product more easily accessible from a client perspective

# **PROPOSITION SIMPLIFY**

# STEP 2 - More Useful

# **Vary Performance**

have different service levels

# **Improve Quality**

provide customers with better information to help them make better decisions and build better businesses

# **Add New Capabilities**

by way of extension services and strategic adoption of technology

# **Provide a Wider Range of Products**

by expanding your service offering and service levels

# Personalise your customer experience and relationship

through a combination of systemic personalisation of delivery and a process of intentional wows

# **STEP 3 - More Aesthetically Appealing**

How can you enhance the appeal of your product? Can you improve the appearance or texture or how it makes the user feel? Can you turn consumption into a great experience? Can you introduce a creative and artistic finish to your service delivery?

**ProfitPro Live 2020** 

# PRICE SIMPLIFY







# **STEP 1 - Subtract Features**

What is the core primary function of your product/service

What is essential and what is non-essential?

Reduce non-essential and reduce cost

# **Subtract Size**

Reduce service levels for those who do not want more and in do so reduce the expense of production

# **STEP 2 - Reduce Variety**

Invent a universal product that serves your customers by following a consistent process and model

# **STEP 3 - Add Cheap Benefits**

Can you provide a benefit or a bonus to your product offering that is low cost (or free) for you to add that would provide substantial value for your customer?

# **STEP 4 - Automate**

Standardise how the work is done by creating standard operating procedures that optimise the use of technology and automation.

# **STEP 5 - Orchestrate**

Provide a unifying plan — conduct the acquisition of customers and the people who deliver the result those customers want into one place on one platform.

# PRICE SIMPLIFY

# **STEP 6 - Co-opt Customers**

Get the customer involved — show them a way to reduce expert time and encourage self-assembly. Make the customers part of your sales force bringing in new ideal customers

# **STEP 7 - Sell Direct**

Create a direct supply sales channel to multi-entity introducers & niche customers. Expand your own service offering and create a supply chain to provide other products and services. Use technology to change how new customers are acquired

# **STEP 8 - Use Simpler Technology**

Use disruptive technology to change how you acquire, interact with, serve and relate to your customers.

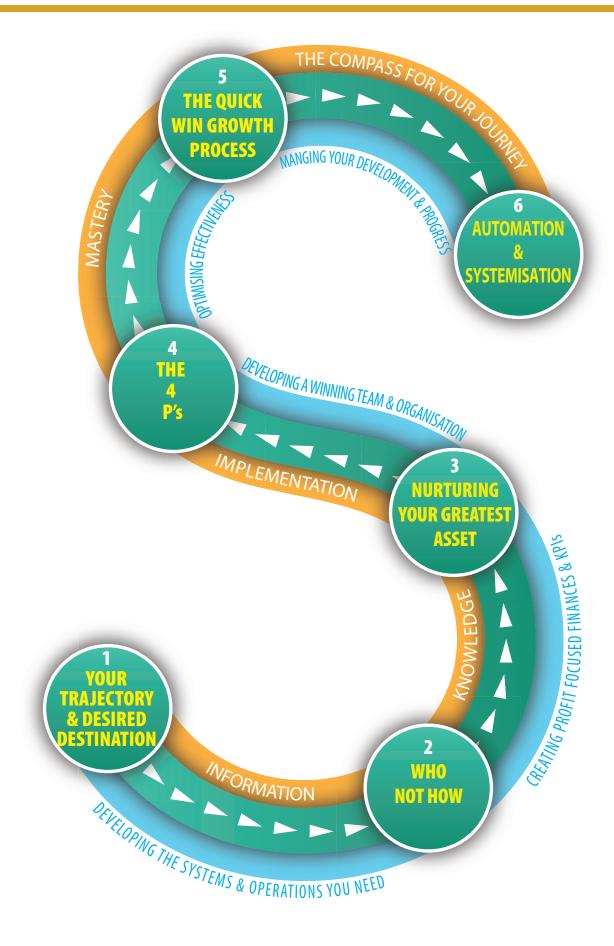
# STEP 9 - Scale Up

Scale up building volume to reduce costs and grow nationally and / or roll out internationally.

<b>PROFIT</b>	PRO

# THE TRANSFORMER TOOL The Experience You Want to Transform 1. Briefly describe the experience you'd like to improve and learn from 2. WHAT'S WORKING? WHAT WORKED 3. WHAT'S NOT? WHAT DIDN'T? 4. IMPROVEMENT 5. ACTION Knowing what you know now, how could you enhance What would produce a much more strategic, successful or refine this experience? and satisfying experience in the future? 1. 2. 3. 4. 5.

# 6-Step Success Path



# STRATEGY FUNDAMENTALS



Ι.	i will pay mysell first a living wage of . €
	*Living wage is the minimum amount your business needs to pay to fund your life
	Process Goals/Drivers
2.	I will pay myself first from my business €for investment and wealth creation*
	<u>By /</u>
*	Investment & wealth creation is the amount of money you need to save, pay into pension, or invest to create the wealth you need for the future.
	Process Goals/Drivers
-	
	3. I will work hours per week or hours per month
	By //
	Any additional specifics ad desires in relation to how you work and where you work
	Process Goals/Drivers

# STRATEGY FUNDAMENTALS



4. I will take	weeks holiday a year* By			
*Add any additional spec	ifics and desires in relation to how you want to		amily time and time for you	rself_
Process Goals/Drivers				
y business will achieve a	profitability of	by		
Process Goals/Drivers				
My business model will l	pe based on*			

# STRATEGY FUNDAMENTALS



Payment

		ixed Price Billing, Menu Pricing, DD and Accelerated Paym good, Self Employed, Compact Business, Scaleable Busine
7. My business will achieve a gross	profit percentage of	and a net profit
percentage of		_
Process Goals/Drivers		
8. My Business will achieve a turnov	ver of €By	<i>J</i>
Process Goals/Drivers		
9. My business will have	_customers with an	average fee of

# STRATEGY FUNDAMENTALS



	If your business mo	odel is better reflected by having cate	egories of customers complete the
	following instead:		Berner en cascerners compress une
	<u></u>	customers with an averag	ge fee of €
		customers with an averag	ge fee of €
		customers with an averag	ge fee of €
		customers with an averag	ge fee of €
10. M	y business will carry	months of operating cash reserves	3
Ву		or €in cash.	
	Process Goals/Drivers		
11. M	y business will be known	for our expertise with the following t	ypes of business(es) / niche(s)
	Niche 1	Niche 2	Niche 3
		<u>'</u>	<u>'</u>

# STRATEGY FUNDAMENTALS



Process Goals/Drivers			
		,	
12. I will systematically grow my busine			
and		<u>_</u>	
*Examples of methodologies to grow business – w	ord of mouth referrals, digital r	narketing, developing a sales team, networkir	ıg, publishing, sp
Process Goals/Drivers			
13. I want to do these things in my busi	ness		
1.	2.	3.	
Process Goals/Drivers			

14. I do not want to do these things in my business

# STRATEGY FUNDAMENTALS

15.

<b>PROFIT</b>	PRO	
		,

1.	2.	3.
Process Goals/Drivers		
,		
The most important thing for me about	heing in husiness is	
The most important timing for the about		
Process Goals/Drivers		

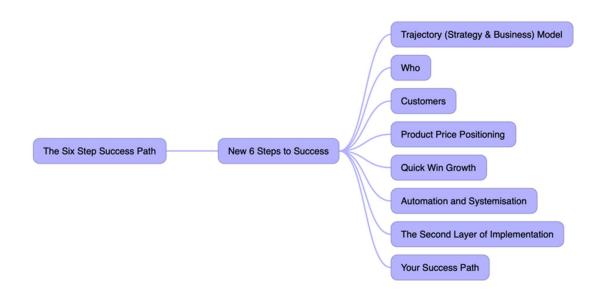
# STRATEGY FUNDAMENTALS



# **BUILT TO SELL - 7 STEP FORMULA**

#### **Develop a Single** Build a **Focus Growth and** management team a Sales Process who can run the business **Develop a System** Marketing to Deliver Management team the Result Sell to the Niche that will stay after you qo The Accountants The Business **Growth Loop** Deferred Bonus **Build the Team** Format Franchise Scheme Creating a Sales Model **Funnell** Performance Bonus Think Who not How Digitisation **Create a Positive** current year Winning New **Cashflow Cycle** Organisation Chart An organisation Customers not **Identify the Ideal** Deferred Bonus 3 structure dependent on you **Customer to Buy** Years out Roles & Deliverables the Products and Fixed Pricing Standard operating **Digital Marketing** ▶ Who Hunting Services procedures Progression **Develop Products Payments** Roles and or Services with the Niching responsibilities – Monthly **Potential to Scale** Red Velvet Rope not personality **Subscription Model Policy** dependent and Direct Debits Niching Ideal Customer Digitisation Basic products and Avatar services Advisory and value integration Digitisation

Incentive Scheme for Senior Team Members



# The Six Step Success Path

- New 6 Steps to Success Phase 1
  - Trajectory (Strategy & Business) Model
  - Who
  - Customers
  - Product Price Positioning
  - Quick Win Growth
  - Automation and Systemisation
- New 6 Steps to Success Phase 2
  - The Second Layer of Implementation
  - Your Success Path

# The Accountants Revolution

# 1. Trajectory (Strategy & Business) Model

## • Built to Sell

- o The saleable scaleable automatic business
- Step 1 Develop Products or Services with the Capacity to Scale
- Step 2 Identify the Customers to buy the products and services you want to sell
- Step 3 Create a Positive Cashflow Cycle
- Step 4
- Step 4 Develop a System to Deliver the Result
- Step 5 Develop a Single Focus for Growth and a Sales Process
- Step 6 An attraction and retention plan for Team

# Simplify

Modelling the most successful scaling business in the world

#### • Proposition Simplify

- Step 1
  - Make it Easier to Use and Access
  - Eliminate everything that is to essential
  - Make it Intuitive and Easier
  - Make it Faster
  - Make it Portable
  - Make it Easier to get what you really want
- Step 2
  - Make it More Useful and More Valuable
  - Variable levels of service
  - Improve Quality
  - Add New Capabilities
  - Provide a Wider Range of Services
  - Personalise
- Step 3
  - More Aesthetically Pleasing

#### • Price Simplify

- Subtract Features
- Reduce Variety
- Co-Opt the Customer in Choice of Service Level
- Add Cost Effective Benefits
- Automate
- Orchestrate
- Co-Opt the Customers
- Use Simpler Better Technology
- Scale Up

## • The Membership Economy & The Forever Transaction

#### Customer Centric Business

- Deeply and truly understanding what the customer wants and needs
- What does the owner want?
- How are they going to implement
- Look through employed team members eyes
- Accepting that some clients want everything and some clients just want compliance
- Meeting the customer where they are on their journey
- Showing them the first next steps on their success path
- Give them options
- Give them a road map
- Accepting that not everyone is going to go all the way
- Getting clear on what you do and what you don't do.
- Have a Red Velvet Rope Policy
- Who is

#### The Business of Accounting

- The Business owners needs to chose
- The owners role is to develop a business
- Are you an entrepreneur?
- Are you an accountant?
- Are you an entrepreneurial accountant?
- Are you an accountant who owns a job?
- Are you an accountant who owns a business?
- An architect who has developed a system that gets a result that customers want
- If you were to emigrate to Australia on 1st of January 2021and you wanted to still run your business as your primary source of income
- Generate a Profit But at what price

- Bottom Line Profit
- Indirect Costs Non Financial
- Indirect Costs Financial
- Direct Costs
- Turnover
- The owners roles is to develop the platform
- Connecting Client wants and needs with the resources
- Internal whos
- External whos
- To get the results that customers want
- Doing accounting and bookkeeping Vs Developing a customer platform
- The businesses role is to get a result for customers
- The businesses role is to achieve customer success

#### • The Memberised Firm

#### Why

- The Ascendancy Model
- Recurring Income
- Subscription Model
- Membership Model
- Standard Accounting Firm V Subscription V Membership
- Standard accounting firm
- Transactional Focussed
- They Might Recur
- There is loyalty
- There are referrals
- Is there connection?
- Subscription
- Financial Arrangement
- Membership An Attitude An Emotion

## Why Now

- The shift is brought on by an outside force
- It ties into a human need
- Think Maslow's Hierarchy of Needs
- The impact can be seen across a wide range of industries and companies
- This trend becomes the new normal

#### How

- Designing a model of operation
- Not just one way connection
- Firm down
- Not just a two connection

- Provide feedback
- Tell us what they want
- Three way connection
- Firm down
- Feedback up Respond to wants and needs
- Peer connection
- What do people want Belonging

#### What

- Examples
- Facebook
- Linkedin
- Netflix
- Adobe
- Microsoft
- Xero
- Quick Books
- Oral B
- Amazon
- Vodafone
- American Express
- Newspapers
- The Ice Bucket Challenge
- Alan Weiss
- Dollar Shave Club
- The Nail Concierge

# • What does an Accountant Really Need

- Automated digital firm
- Minimised Dependency on Pesonalities
- Not dependent on partner / principle being in the office
- Remote Management
- Digital Partner Role
- Client Interaction
- Freedom
- What does that look like
- Freedom
- Freedom to work from home
- Freedom to work abroad
- Extended holidays

# 2. Who not How

- Who are your 5 Whos?
- We are all only 5 who's away from industry domination
- Who do you have? Who do you need?
- Where are your Whos
- External Whos
- How do you engage with your Whos
- How do your Who's want to work

# 3.Nurturing your Greatest Asset – Your Customers

- Who are your Customers?
- Who are your ideal customers?
- What is your red velvet rope policy
- Who are your non-ideal customers?
- What is Customer Success
- What does Success Look Like for Them
- Not what you think it looks like What it actually looks like
- What does a forever customer look like
- What is the Customer Success Path

# 4. The 4 Ps – Proposition, Product, Price and Positioning

- Product
  - Have a customer service success Path
  - Have a customer play book
  - 4 or 5 things that you can do really well as consulting projects embedded in our model
- What is the Product Stack
- Service Stack
  - Level One
    - Basic, Basic, Basic
    - Output
    - Nominal ledger & Trial Balance
    - Self Done
    - Verification, checking and review

- Firm Done
- No partner involvement
- Self Done
- Tech Stack Co-opt the customers to work in the way that we want them
- Firm Done
- Customer does what they want
- Interface
- This is how we do it
- A system
- A process
- The external system
- The internal system
- Entry Point
- Either the firm does the work
- Or the firm checks the client work
- The outputs are the same

#### Second Level

- Accounting
- Statutory financial statements
- Income tax returns
- Corporation tax returns
- Co Sec Compliance
- Audit
- No Partner involvement
- Deal with your customer liason
- Deal with your customer success agent
- Pay for a partner upgrade
- Closing meeting
- What is a partner upgrade
- Zoom call

#### Third Level

- Management
- Management accounts
- Analysis & KPIS / Dashboard
- App
- Cashflows and projections
- App
- Basic business and personal budgeting
- Business finance sources and resources
- Trouble shooting and problem solving
- Tax Planning
- No Partner involvement
- Deal with your customer liason
- Pay for a partner upgrade

#### Fourth level

- Strategy
- Wealth management
- Fee basis
- Wealth creation
- Strategic planning and implementation
- Leveraged advisory
- Customer Masterminds
- Virtual FD
- Partner Involvement
- Leveraged partner Involvement
- Pay for more partner involvement unlimited access
- Create Project Work
- Value Pricing Factored into the Basic Menu Pricing with Options for Add on Projects

#### Fifth Level

- Projects / Problem Solving
- Fixed Pricing / Pricing in Advance
- Value Pricing
- Bigger firms have bigger internal capabilities
- Do we do it internally?
- Do we refer to trusted external partners?

## Pricing

- Embedding Value in the Model
- Service Stack Maps into your Menu Pricing
- What level
- What level of activity
- How do you Price
- How do your price now
  - Retrospective Based on Time Sheets
  - Fixed Pricing
  - Menu Pricing
  - Value Pricing
  - Membership Pricing

# How do insurance companies' price?

- What is the mathematical formula to account for claims
- 100 Customers take out car insurance
- Each policy costs \$1000

- The insurance company know that statistically based on risks and past results that there will be 10 claims of \$5000 each
- The cost of managing those customers is \$25000
- Their profit margin is \$25,000
- What is the mathematical formula to account for claims
- I have X clients of this type
- Some will overuse
- Some will under use
- What resource do I need to create a basic result
- What resources are going to be consumed
- How do i match the value to the customer success experience
- Factor in a buffer

#### The accountant has 50 Clients

- The average fee is \$2000
- The total income is \$100,000
- The direct team costs are 40 %
- GP of \$60000
- The office overhead is \$15000
- The infrastructure overhead \$20000
- Client apps
- Accountant tech structure
- The net profit is \$25,000
- Some clients consume more resources than others
- Some clients consume less resources than others
- If the model is working well a do you want a \$250,000 business or do you scale the model to a \$500,000
- The underlying automatic capture process to TB is on the client or at least shared by them
  - This is the variable
  - Use technolgy
  - use client education
- From TB to statutory accounts is fixed price
- We monitor the consumption by doing After Action Reviews
- We advise the customers who are gone off track Here is how you stay at this price point?
- We modify the price only if abseloutely necessary
- We modify the customer behaviour

- The focus is on outputs
- The focus is on customer success
  - The focus is on the result that they want
    - Compliance
    - Compliance plus direction
    - Compliance plus direction plus wealth creation
    - Compliance plus direction plus wealth creation plus taking over the world
- Group the clients appropriately
- Build the system so it the time variable processing dent impact on the end result because you have co-opted the customer
- Move them through the pricing model
- The focus is on Customer Success
- Membership
- Accountants already have recurring fees
  - Positive Business Model
  - Blocker to change
- Customer Success Agents V Accountants and Bookeepers

# 5. Quick Win Growth

- The Accountants Growth Loop
- Your Customer Funnel Your Customer Chute
  - Awareness
  - Contact
  - Results Conversation
  - Trial
  - Scoping
  - Sign Up
  - Loyal Member
  - Increased Engagement
  - Referrals
  - Testimonials / Case Studies
- Quick Cash Accelerator
- New Customer Acquisition

# 6.Leverage - Automation & Systemisation

- Automation and Systemisation
  - Business Model
  - Tech Stack
  - Internal Processes
  - External Processes
  - This is how we do it here
  - Closed Model
    - External client facing
    - Internal operational system
    - For example
    - Xero
    - Receipt bank
    - Pleo
  - Choice Model
    - Big Business Stack
    - Small business stack A
    - Xero + Receipt bank
    - Bigger business that needs better OCR
    - Xero + Hub Doc
    - Small businesses less receipts
    - Small business Stack B
    - QB + Auto Entry
  - Open Model
    - We will work whatever you have
    - Price cheaper our preferred operating system/ stack
  - What is our tech Stack?
  - What should be in our tech stack?
  - Practice Management System
    - CRM
    - Customer Information
    - Customer Tracking
    - Billing
    - Reporting
    - Internal Firm Reporting
  - Deadline Management
    - Tech options
    - Onkho
    - Xero Practice Management
    - Sage Practice Solution

- Workflow Max
- Senta

## Accounting System

- Bookeeping
- Xero
- Big Red Cloud
- Surf
- Quick Books

# • Financial Reporting

- Sage Accounts Production
- Relate
- CCH
- Iris
- Other Apps

# • Invoice Automation

- Receipt Bank
- Auto Entry
- Payroll
  - BrightPay/ Thesaurus
  - Collsoft
- Quoting, Proposals and Onboarding
  - Practice Ignition
  - Go Cardless
  - Cloud Pricing
- AML
  - IDPal
- DD Service Provider
- Payment Gateway
  - Bank Platform with Overlay App
  - Go cardless
  - Stripe
  - NuaPay
  - LumiPay
  - PayPal

## • Integrated Expense Management Tool

- Soldo
- Pleo
- Expensify

## Reporting/ Dashboard/ Cashflow

Fathom

- Float
- Fluidly
- Futrli
- Spotlight
- Syft
- Castaway
- Flex
- Xapier

## Project Tracking

Timely

#### • Team Communications

- Microsoft Teams
- Slack
- Zoom

## • Customer Communication

- CRM
- Zoom
- Text Facility
- VOIP Phones
- No handsets via teams
- Ask me Anything Sesions

## Online on Website Interaction

- Drift
- Zen Desk
- Into firm Knowledge Hub

#### Paperless Office

- Virtual Cabinet
- DocuWare
- E-file Cabinet

#### Website

- Portal
- Virtual Cabinet
- Education Portal
- Kajabi
- Lead magnet Hosting

# • Email service provider

- Infusion Soft
- Business Automation
- Tagging

## Community

- Facebook groups
- Client Community Builder / Forum

## • Knowledge Base

Zen Desk

## • Diary Management

- Oncehub
- Calendly

- Capterra
- Integrating with a calling platform like zoom
- ScheduleOnce
- Acuity Scheduling

## • Client User Apps

- Shopify
- Quaderno
- Taxomate
- Industry specific
- Farmers
- Farmflo
- Figured
- Health Sector
- Clinkiko
- Retailers
- Vend
- Construction
- BuilderTend
- SimPro
- Professionals
- Harvest

# • The Changing Role of the Accountant

- Capitalise
- IWOCA
- Satago
- Operations
- Zapier Integrations for Day to Day activities
- Fintech Platforms
- Cashplus
- Systems hosting
- Process Street
- Knowledge Platforms
- Zen Desk
- Kajabi/
- Artificial Inteligence

# • The Second Layer of Implementation

- Operations
- Marketing and Business Growth
- Technolgy
  - Income tax platform
  - Bookkeeping VAT
- Profit Focussed KPIs

- Volume
- Duration
- New Customers
- Retention
- · Developing a winning team and organisation
  - Management Process
  - Meeting Rhythms
  - Roles And Deliverables
  - Talent Retention
- Optimising effectiveness
  - Work Practices
- Managing Your Development
  - Personal Evolution
  - Business Evolution
  - Team Development
- Leveraging Your Business
  - Accountancy Business Acquisition
  - Strategic Partnerships
  - Advanced Brand Building
  - New Client Acquisition
  - Freemium
  - Digital Marketing
  - Telesales
- Scaling Your Business
- Your Success Path
  - Start Up Firm
  - Established Firm Not Digital

# The Implementation Plan

- 10 Steps to Success
  - Where are you now?
    - Self Assessment across the core areas of your business and model
  - What do you want and what does it look like?
    - What is the strategy?
  - What is the Gap?
  - How do we close the Gap?
    - Your Success Path
      - Bringing you step by step from where you are to where you want to be
  - What are the Priorities?
  - What is the ONE Thing?

- What is the action plan?
- Who are the who's?
- First next steps

## • The Biggest Blocks

- Existing Customers
- Good Enough
- Time

# • Making Lasting Change

- 6 Steps to Change
- Success Habits
  - Strategic Goals
  - Process Goals
  - Success Habits
- Effective Diary Zoning