



10 Things the most successful bookkeepers will be doing in 2020

Michael Palmer



About today's speaker



Michael Palmer

Host of the Successful Bookkeeper Podcast

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Proud Papa

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 THE POWER OF SYSTEMIZING YOUR BOOKKEEPING BUSINESS

DEBBIE ROBERTS, CO-AUTHOR, E-MYTH BOOKKEEPER THE SUCCESSFUL BOOKKEEPER

 YOUR CLIENTS' SUCCESS IS YOUR SUCCESS

JEREMY ALLEN, FOUNDER, SYSTEM SIX BOOKKEEPING THE SUCCESSFUL BOOKKEEPER

 5 PRODUCTIVITY APPS THAT ORGANIZE & SAVE YOUR TIME

SCOTT FRIESEN, FOUNDER, SIMPLETIVITY THE SUCCESSFUL BOOKKEEPER

 HOW TO SET GOALS FOR A PROFITABLE NEW YEAR

DEBBIE ROBERTS, CO-FOUNDER, PURE BOOKKEEPING THE SUCCESSFUL BOOKKEEPER

 HOW TO SET YOURSELF UP TO WIN EVERY DAY

SHARON FRANCISCO, BUSINESS MENTOR THE SUCCESSFUL BOOKKEEPER

 HOW COFFEE MEETINGS LEAD TO BUSINESS REFERRALS

OMAR VISRAM, CO-FOUNDER, ENKEL THE SUCCESSFUL BOOKKEEPER

 HOW CPA ACADEMY CAN HELP YOUR BOOKKEEPING BUSINESS

SCOTT ZARRET, PRESIDENT, CPA ACADEMY THE SUCCESSFUL BOOKKEEPER

 THE BOOKKEEPING ANSWERS YOU'VE BEEN SEARCHING FOR

BEN ROBINSON, FOUNDER, BOOKKEEPER BUSINESS LAUNCH THE SUCCESSFUL BOOKKEEPER

 THE BENEFITS OF BOOKKEEPING CONFERENCES

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 HOW TO BALANCE YOUR BUSINESS & FAMILY LIFE

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 HOW TO BE THE FIRM OF THE FUTURE

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 HOW SOCIAL NETWORKING CAN BOOST YOUR MARKETING

SETH DAVID, PRESIDENT & FOUNDER, NERD ENTERPRISES THE SUCCESSFUL BOOKKEEPER

 HOW FIXED PRICING WORKED FOR ME

AMANDA BIRCH, PRESIDENT, BIRCH ACCOUNTING & TAX SERVICES THE SUCCESSFUL BOOKKEEPER

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 CONSIDER THE PROACTIVE BUSINESS MODEL

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Icebreaker...

What's your favorite
podcast?

Share with your neighbor.

Agenda

How To **Own The Future** By Predicting The Future

The Power Of Focus

10 Things The Most Successful Bookkeepers Will Be Doing In 2020

Making It Happen

CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register



**What if you could
predict the future?**



**The best way to predict the future is
to create it.**

Abraham Lincoln





10 Things you can do in
2020 to...

OWN THE FUTURE



Please don't do them all
at once!

You can't do
EVERYTHING

But you can do
ANYTHING



The One Thing By Gary Keller

The Simple Truth Behind Extraordinary Results



Big Questions...

- Can you do everything?
- Should you drop everything?
- Do you need more discipline?
- Is Multitasking the answer?
- What if you don't have time?

A photograph of two rabbits running across a grassy field. The rabbit on the left is slightly ahead and has a dark patch on its back. The rabbit on the right is slightly behind and has a lighter brown coat. Both rabbits have long, upright ears and are looking towards the camera. The background is a soft-focus green field.

Extraordinary Results

*Are determined by how
narrow you make your focus.*

Don't Drop Anything

*Just start focusing on
ONE thing.*



Discipline

*You need just enough
to build a habit.*



Multitasking

Is like your brain on drugs. Just say no.



No Time?

*Time blocking is
the secret to
success.*



A festive night scene with people celebrating. In the foreground, a man with a beard and glasses, wearing a red scarf and a patterned jacket, holds two lit sparklers and smiles. To his left, a woman with blonde hair, wearing a light-colored jacket, looks up with an open-mouthed expression of joy. The background is filled with other people, some holding sparklers, and a shower of golden confetti falling through the air. Warm, out-of-focus lights create a bokeh effect in the background.

What will you focus on in 2020?

A decorative pattern of small, dark blue dots arranged in a grid, spanning the top left portion of the slide.

#1

Mastering the Art of Pricing

**Pricing is a
journey**





Hector Garcia

- Geek squad – Fixed Pricing
- Started Bookkeeping 2009 with Fixed Pricing
- Went back to hourly
- Returned to Fixed
- Now Successful in Value Pricing

Mastering pricing is A journey





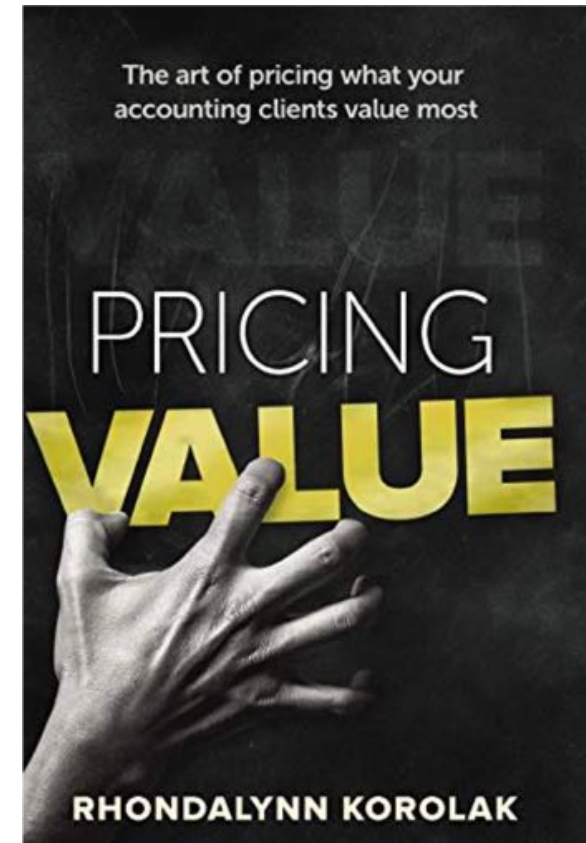
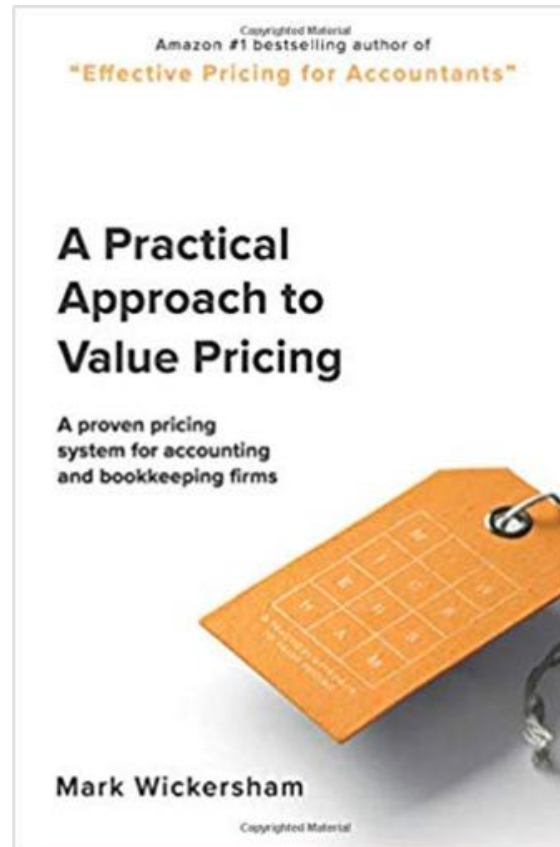
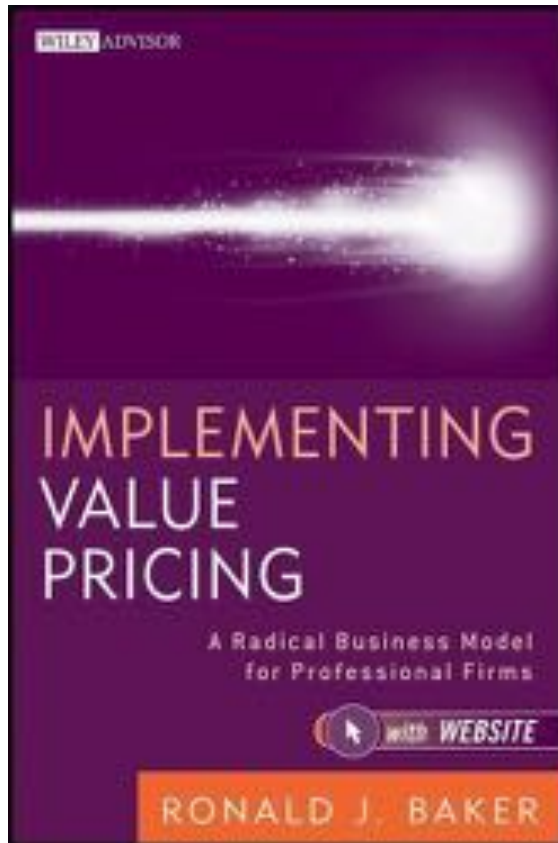
#1

Mastering the Art of Pricing

3 Actions

1. Read books and consume free content
2. Start implementing
3. Work with a mentor

3 Books for your journey



Download the Power Panel documentation...

Value Pricing: Understanding the Art, Science, and Implementation



Ron Baker

Founder, VeraSage Institute



Debra Kilsheimer

Partner, Behind the Scenes
Financial Services



Nayo Carter-Gray

Founder, 1st Step
Accounting LLC



Mark Wickersham

CEO, Mark Wickersham
Training International Ltd

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#2

Build A Business You Love

**Why did you
get into
business?**





Siobhan Harrop-Scott

- Focused on growth
- 600k – Burnt out
- Decided to go smaller, higher value
- Listened to Joe Woodard, Increase capacity by 20% every 90 days
- Optimization strategy implemented
- Increased her capacity
- Pathway to quality of life and falling back in love with her business



#2

Build A Business You Love

3 Actions

1. Get clear on what a business you'd love look like
2. Develop a plan to build this business
3. Get below 80% capacity and execute on the plan

Tomorrow at 1pm



Heather Townsend

Author and Founder of The Accountants Millionaires' Club, Accountants Millionaires' Club

From \$100k to \$1m

The Low-Stress Way to Grow Your Practice



#3

Embrace Change



Change = Opportunity



Nancy Gwynne-Vaughn

- Works only with Law Firms
- PC Law Only
- Kept hearing about automation
- Attends conferences, as many as she can.
- Talks to vendors and assess new apps
- Implemented QuickBooks Online has a new solution for clients to embrace the cloud and automation apps
- Looks for how these apps can improve her business and her clients business



#3

Embrace Change

3 Actions

1. Observe, document and prioritize change
2. Identify pro's and con's
3. Be the first to adopt

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#4

End Chaos with Systems



94% of problems in business are systems driven and only 6% are people driven.

W. Edwards Deming





Debbie Roberts

- 20 Years of Bookkeeping Experience
- Had an entrepreneurial seizure
- Fast path to chaos
- Hired a coach and read E-Myth
- Solved every problem with a system
- 6 Years and 12 staff later
- Business ran independently of her

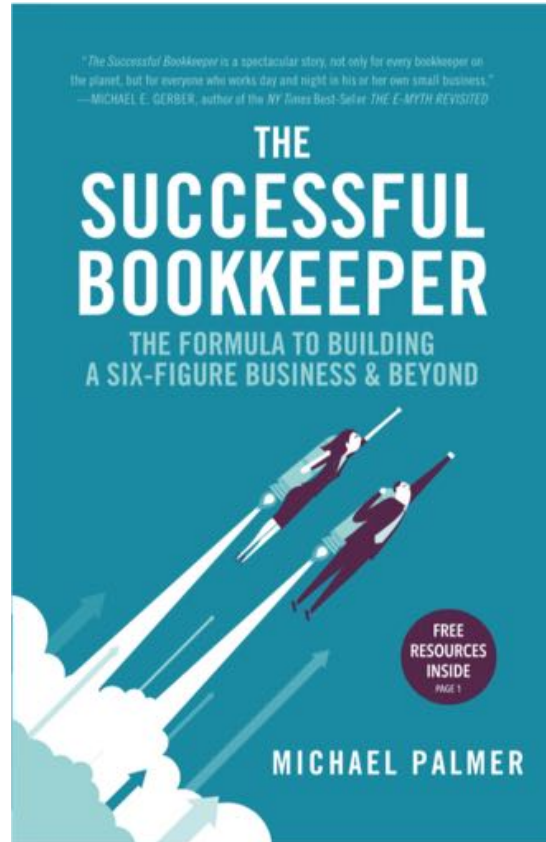
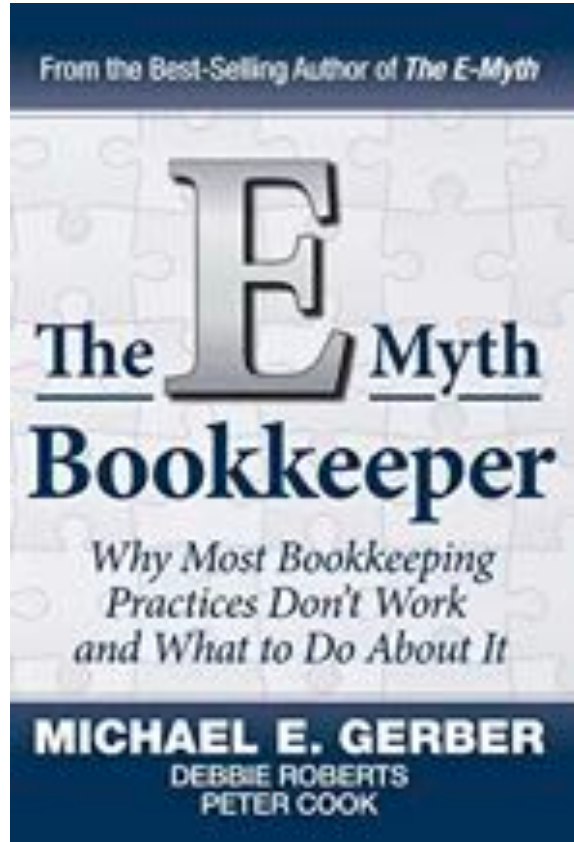
#4

End Chaos with Systems

3 Actions

1. Solve a problem with a system
2. Document the solution to a level of granularity that enables another person to learn and replicate
3. Repeat.

3 Books for your journey





#5

Develop a Clear Marketing Message

**Does your
message pass
the 3 second
grunt test?**



3 Questions you need to pass the test



**What is it
that you
offer?**



**How will it
make my life
better?**



**What do I
need to do
to buy it?**

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#5

Develop a Clear Marketing Message

3 Actions

1. Get clear about who your ideal client is
2. Speak in outcomes they want
3. Update LinkedIn, Website, Business Card



5 MINUTE MARKETING MAKEOVER

Three videos to help you **clarify**
your message and **grow** your
business.



Watch each video and make tangible changes that
will **increase your revenue.**

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#6

Only Work with
Clients You Love

A group of four people (three men and one woman) are sitting at a table, laughing heartily. The image is overlaid with a semi-transparent green filter. The text is positioned on the left side of the image.

What if you **LOVED**
every client you
worked with?



Mira Salter

- Small community Pop. 3500
- Struggled to find new clients
- Looked at the clients she worked with already
- Saw an opportunity with parishes and non profits
- Went to all parishes and non-profits in her area
- Business grew rapidly
- She loves her clients and her clients love her
- Now has 2 staff

Create a spreadsheet of your clients...



Where have you had the greatest...



Impact



Income



Joy

Add to the spreadsheet



Impact
Income
Joy
Gross
Revenue
Net Profit
of Vendors
of
Employees

of clients
Industry
Office location
Services offered
Products offered
Etc.



#6

Only Work with Clients You Love

3 Actions

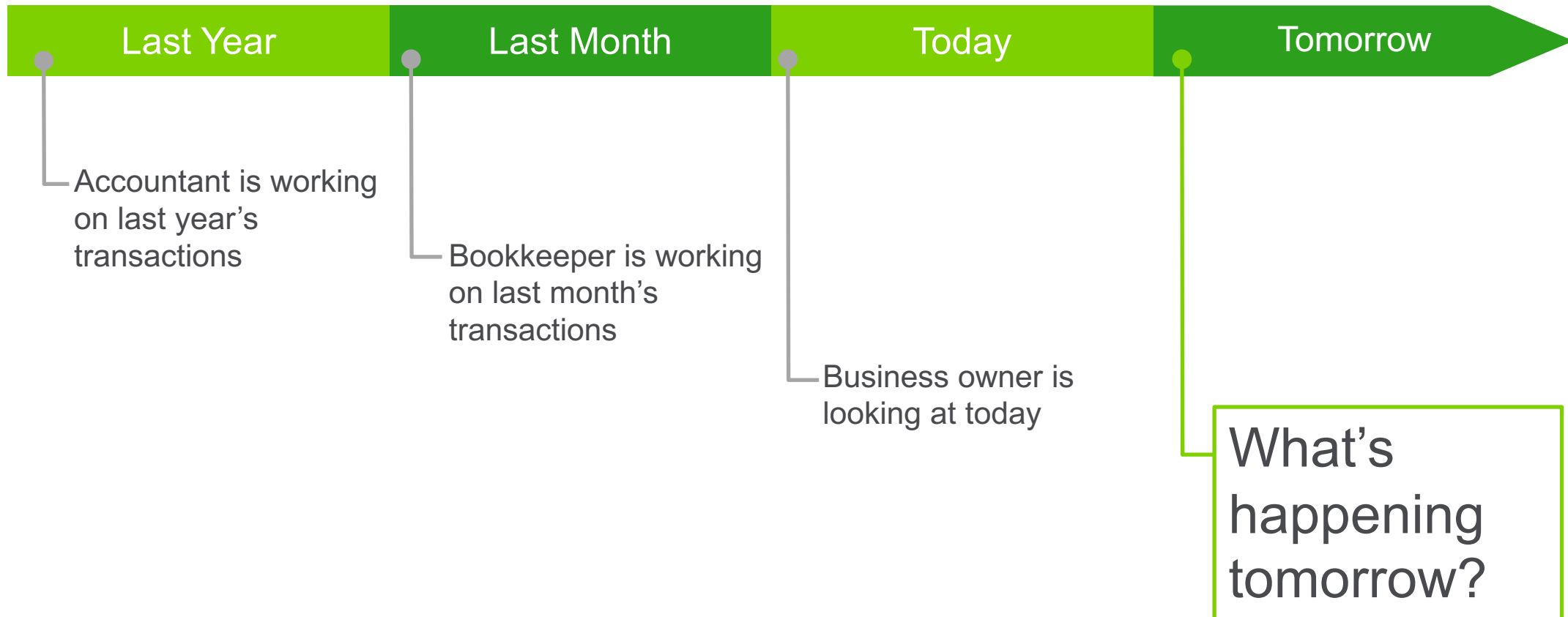
1. Do the analysis and make the choice
2. Deliver what they want
3. Focus on attracting only these clients



#7

Transition from Technician to Strategist

A typical year in accounting



What if you helped business owners...

A person's hands are shown holding a glowing green sphere. The sphere has the text 'OWN THE FUTURE' overlaid on it. The background is a dark, textured surface, possibly a person's torso or a piece of fabric. The overall image has a green tint.

**OWN THE
FUTURE**



Lisa Campbell

- Got clear about what she wanted
- Implemented systems & processes
- Moved to value pricing
- Added workflow automation
- Hired & trained great people
- Delegated the work
- Deliver high value strategic consulting to help business owners OWN their future



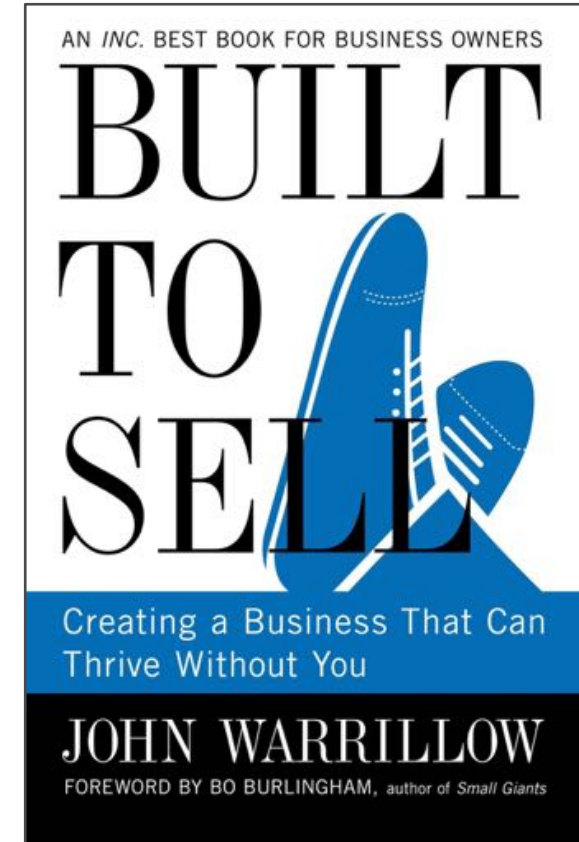
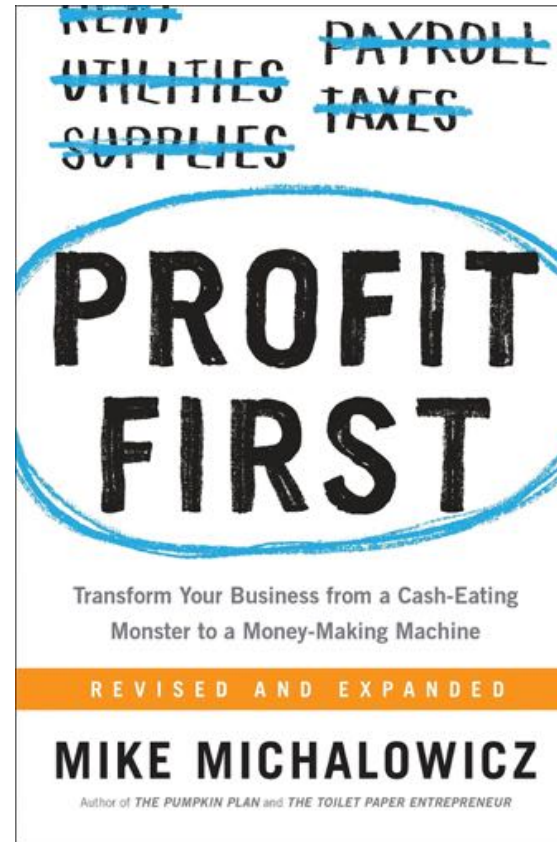
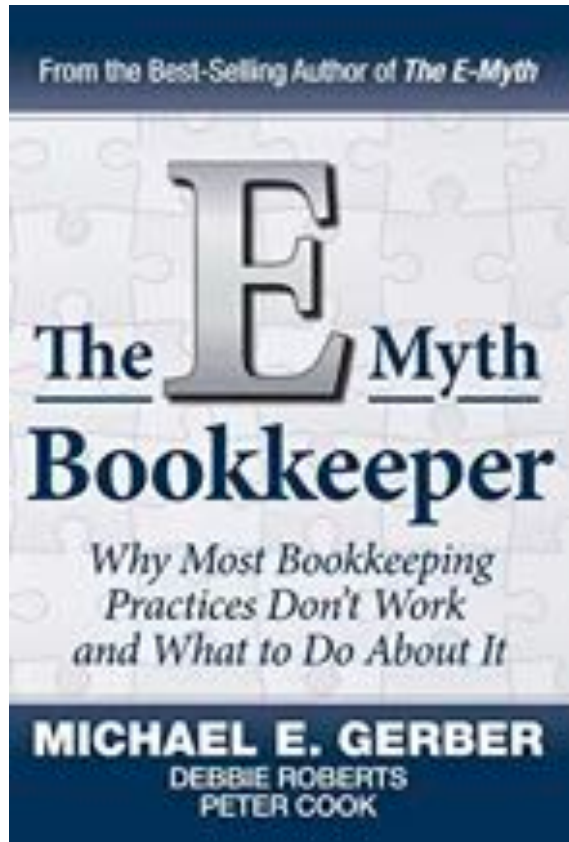
#7

Transition from Technician to Strategist

3 Actions

1. Choose: Technician or Strategist
2. Get off the books
3. Help business owners achieve their vision

Resources to help you get there



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#8

Become Known for Knowing Something



An expert knows something, a thought leader is known for knowing something.

Matt Church, Thought Leaders Global





Jessica Fox

- Noticed that clients needed better education around bookkeeping
- Wrote a short guide
- Guide turned into a book
- Put the book up on Amazon
- Now this is one of her best lead sources

BOOKKEEPING BASICS FOR ENTREPRENEURS

TAKING THE MYSTERY OUT OF YOUR
COMPANY'S FINANCIALS



JESSICA FOX



Start sharing what you know with the people that want to learn what you know and you will find your expertise.

Hector Garcia





#8

Become Known for Knowing Something

3 Actions

1. Determine the change you want to make in the world
2. Who you want to make it for
3. Start making that change happen today

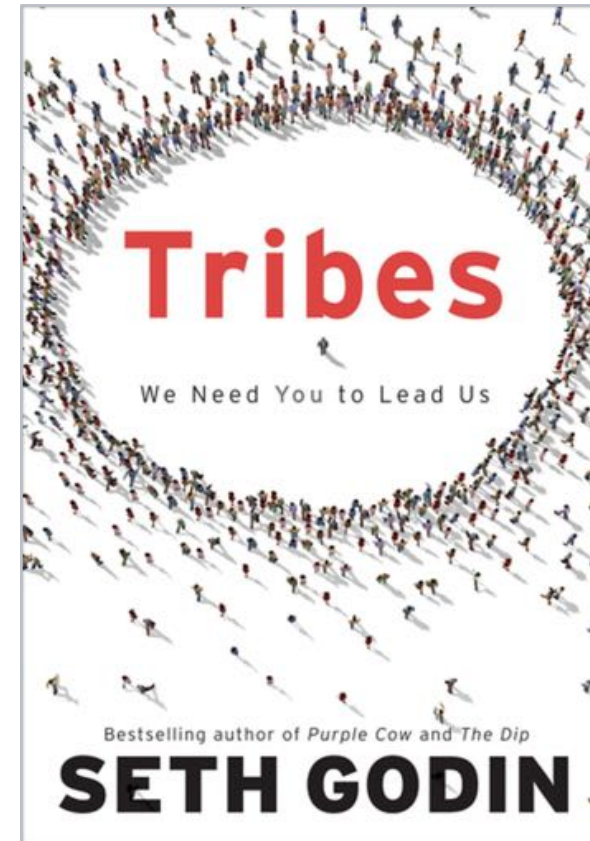
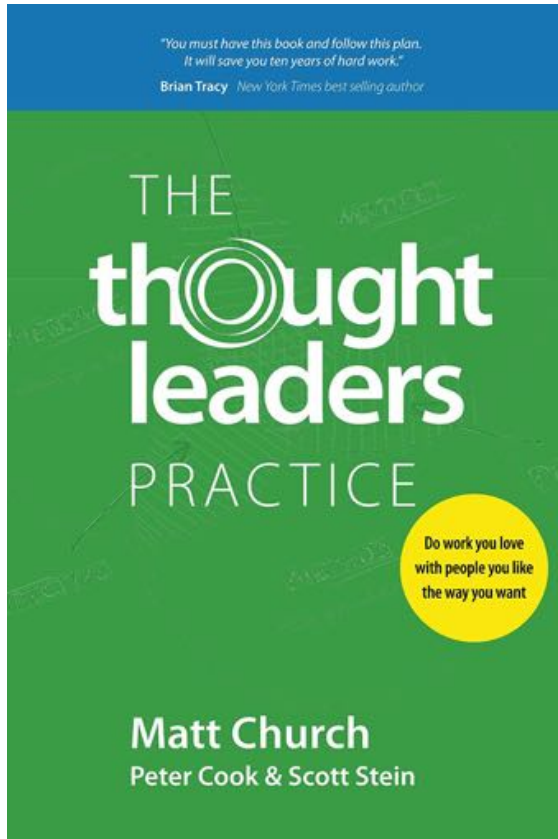


Don't compare yourself to others, just start.

Hector Garcia



Resources to help you get there



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#9

Helping Clients Own the Future

**Clients don't
need another
report**





Angela Meharg

- Owner of Datisfy
- What are the questions you're clients are trying to answer?
- Maybe they don't know the questions they should be asking?
- How do you get the data and present it in a meaningful and powerful way
- If you're spending a log of time in manipulating data in excel you need a better tool



#9

Helping Clients Own the Future

3 Actions

1. What are the questions?
2. How can you help to get them answered?
3. Find the tools that will help answer them quickly

Learn about these app partners here at QB Connect



A decorative pattern of small, dark blue dots arranged in a grid, located in the top-left corner of the slide.

#10

Don't Do It Alone

**Working
independently
can be
isolating**



HURRY SEATS ARE FILLING FAST



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Photo/Video



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Ask for Help...



Announcements



Michael Palmer

Admin · June 1, 2017 · Montreal, CA

Welcome to the The Successful Bookkeeper Community Facebook Group.

STEP 1: introduce yourself by clicking the link below.

<https://www.facebook.com/groups/theSuccessfulBookkeeper/permalink/191621122032736/?fref=fbf> See More

THE COMMUNITY

about 40



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You have 81 new members this week. Write a post to welcome them.

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Ela Thompson

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about 40

5:21

You're not alone...



Amanda D. Davis

Conversation Starter · August 23

The things that motivated me and inspired me to get out my funk aren't working.

I love this industry, but I'm struggling with a lack of new clients and mental head space that I can't shake. Being financially strapped cause me stress and I hate showing it, especially in the finance world.

For those that struggle with anxiety and depression, what do you do when the dark days continue to linger for too long.



19

52 Comments



Like



Comment



Diana Hesse I have some spiritual CDs that are very upbeat, as well as a "religious" CD. Try to re-work the dialogue in your head. I have been there, and while I'm partially out, I'm not totally. Start with little things because as you take care of the little things, the big things disappear.

Like · Reply · 5w



1



Blair Ann Verrier Just focus on taking one step at a time. Don't focus on big picture, just little things that will bring you closer to where you want to be. If you need a break, take it, but then get back to work. I'm going through similar atm.

Like · Reply · 5w



4



Janetta Howson Great suggestions above! I do take medications that has helped remove the dread I felt every day. Other things: GABA helps settle the brain. It's a natural supplement. I use it on an as needed basis. Vitamin D - I take 7000 units a day (yes 7000). Originally wasn't taking it in the summer, then started having problems again so started it again a few weeks ago. Magnesium (Natural Calm) at night has helped me sleep much deeper. I also take B12 shots. If my levels are between 250 and 500, I have all the neurological symptoms even though I am in the normal range. Learn about how the brain works. Dr. Amen has a book that helps you with your specific issues and therefore the specific supplements to take. Also Dr. Caroline Leaf has books e.g. who switched off my brain. I am a Christian so when I am still struggling, I listen to Christian music while working and read / meditate on the Bible - both help me to focus better and put things in perspective. The above suggestions don't directly get you clients, but may help you face them. Oftentimes, I worry so much about meeting a client as though I am a complete sr***-up, and the above, including what others mentioned help get my head screwed on straight. I think I have used every suggestion above. Lol. ...and still there are many days, I just have to put one foot in front of the other ... and try to never compare myself with someone else's successes. Last idea.... increase your rates. I just did recently thinking I would lose some clients...and didn't. Now I don't have to work as many hours to get the same income. 😊.

Like · Reply · 5w

Ask Questions...



Peter Wahba

☕ Conversation Starter · 15 hrs



1

33 Comments



Like



Comment



1

33 Comments



Like



Comment



View 7 more comments



Crystal Arrington ☕ I am also always at capacity and have to refer out. I'm active in local networking groups and industry groups. Between those and word of mouth I have 3-5 contacts per month. If I have availability then I close 95%-100% of the clients who contact me.

Like · Reply · 2h



1



Tami Hennacy **Crystal Arrington** that's awesome! My goals!

Like · Reply · 1h



#10

Don't Do It Alone

3 Actions

1. Reach out and get connected
2. Be courageous in asking for help
3. Be generous in helping others

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Your Most
Successful Year**



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TEXT **FUTURE**
to
951-494-4446

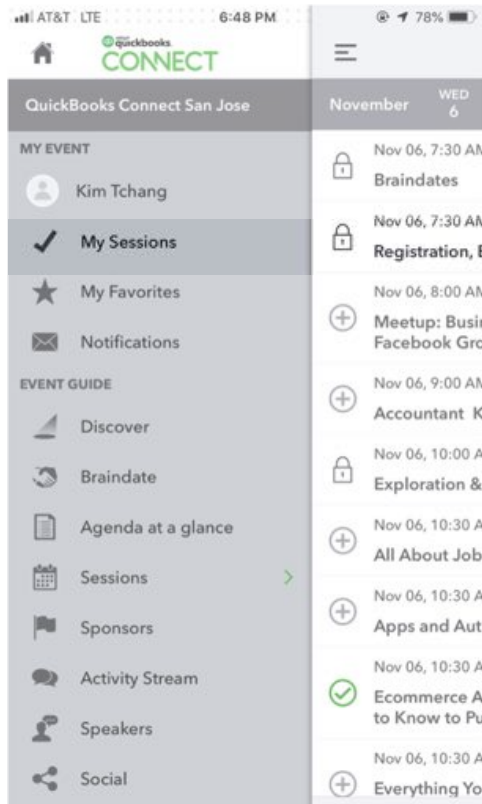


Questions

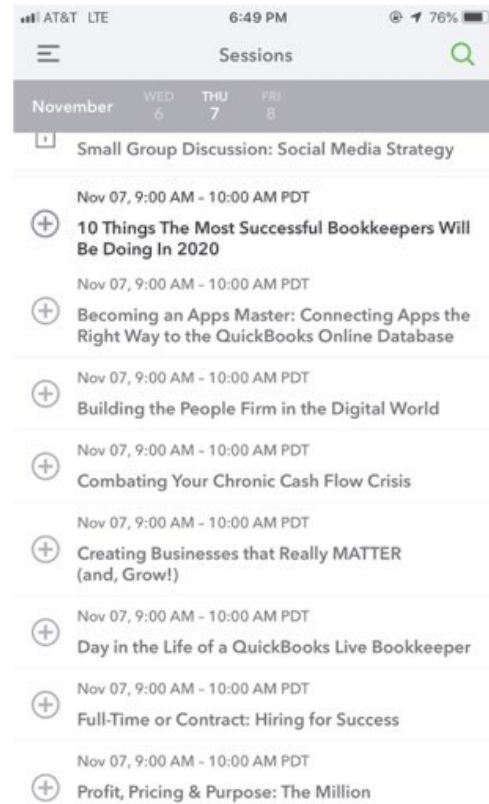
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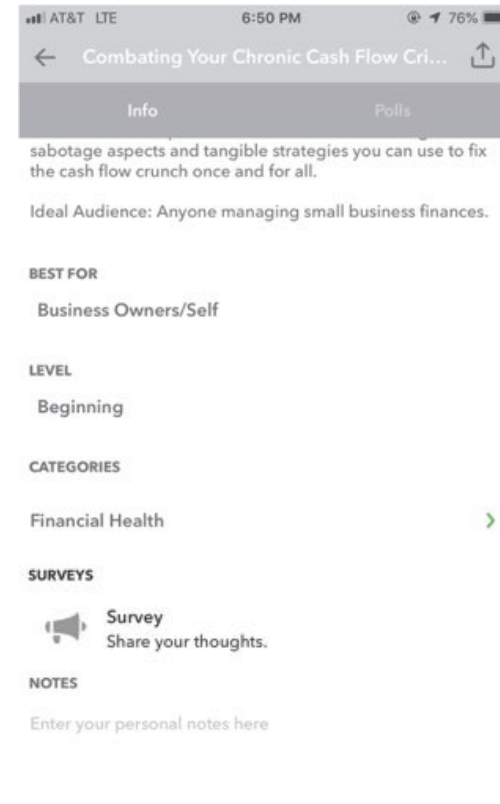
1. Select Sessions



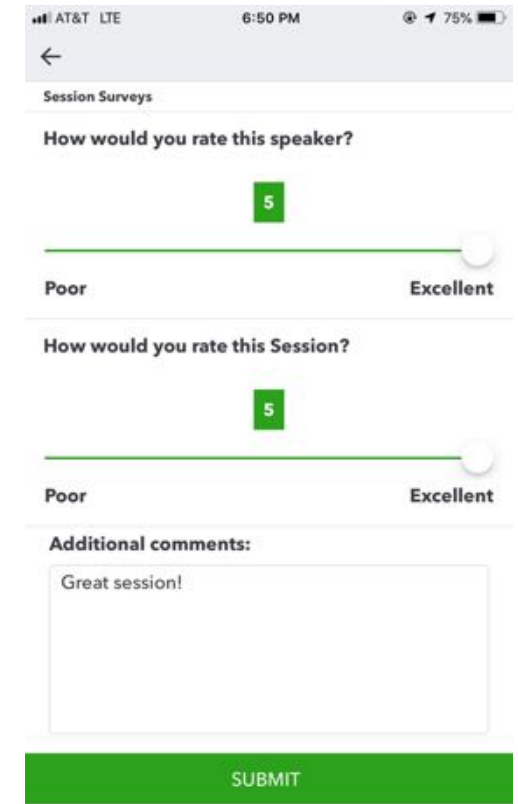
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a Register Now button. The agenda is organized by date, with November 7 selected. A search bar and filter buttons (Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, Financial Health) are present. The agenda items for November 7 are:

- 7:30-7:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: Braindates (New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. Learn more. Best for: All Audiences. CPE Hours: not eligible)
- 8:00-8:30 am: Yoga
- 8:00-8:45 am: Breakout Sessions
 - Small Business Meetup: Relationship Marketing and the Power of Human Connection
 - Small Group Discussion: Social Media Strategy
 - Small Group Discussion: Showing up - Why What You Wear Matters
 - Small Group Discussion: Build Your Dream Bookkeeping firm



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