



What's your number? Scoring your firm's health out of 100 and ways to improve it

John Marshall





What's your number?

CPE Process

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- 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

About today's speaker




John Marshall
President

Results-Driven

Business Mentoring

A thought leader on small business, John has been helping professionals in over 30 industries – including CPA's and Accounting Professionals, to achieve greater billings, profits and rejuvenation

@ResultsDrivenJ



**Today you're going to
discover something
insightful...**

**You're going to discover
your 'number'**

Learning objectives

By attending this session, you will be able to:

- Score the health of your practice on a scale out of 100
- Discover your strengths and weaknesses, in 6 key areas
- Identify your top 2 priorities you're going to work on to improve your practice
- Share your insights and feedback with your colleagues in small break out groups

Agenda

What's your number?

- Answer 20 questions
- Based on 6 key areas of your business
- Rate yourself 0 – 5 (0 – lowest number; 5 – highest number)
- Total score: out of 100
- Identify your top 2 priorities based on your insights

6 Key areas

What are the key areas?



Why these 6 areas?

- Based on insights from 30 industries
- Best practices of highly successful firms
- Drives growth, profits and rejuvenation
- Scorecard is also applicable for your team, and your clients'

Vision

How strong is the vision for your practice?



Vision

- Does your vision excite you?
- Is it clear?
- Does your team know your vision?
- Does your vision include capitalizing on change?

What's Your Number? Vision

On a scale of 0 - 5. (0 - lowest score; 5 - highest score).

Score: _____ The bigger vision for my company excites and motivates me every day to want to achieve greater business results

Score: _____ I'm clear on the vision for my company for this year and the next 3 years

Score: _____ I'm adapting, embracing and capitalizing on change for my business

Total Vision Number: /15

Vision Percentage: _____

Strategy

Do you and your team have a clear strategy to grow your practice?



Strategy

- Do you have a written action plan?
- Do you review your goals regularly?
- Are you comfortable closing new business?
- Are you evolving from Entrepreneur to CEO of your business?

What's Your Number? Strategy

On a scale of 0 - 5. (**0** - lowest score; **5** - highest score).

Score: _____ I've designed a written action plan for my business for the next 60 days and I review my written yearly goals regularly

Score: _____ I'm continuously evolving from Entrepreneur To CEO of my business

Score: _____ I prepare insightful, probing questions before I meet with a client, to ensure each presentation is beneficial

Score: _____ I am comfortable discussing money, negotiating agreements and closing new business

Total Strategy Number: /20

Strategy Percentage: _____

Growth

Is your practice growing as you expected?



Growth

- Do you have a system to generate new business?
- Can you articulate the value of your products and services?
- Do you communicate and listen effectively in all interactions?
- Do you work a sensible schedule and take time to rejuvenate?

What's Your Number? Growth

On a scale of 0 - 5. (**0** - lowest score; **5** - highest score).

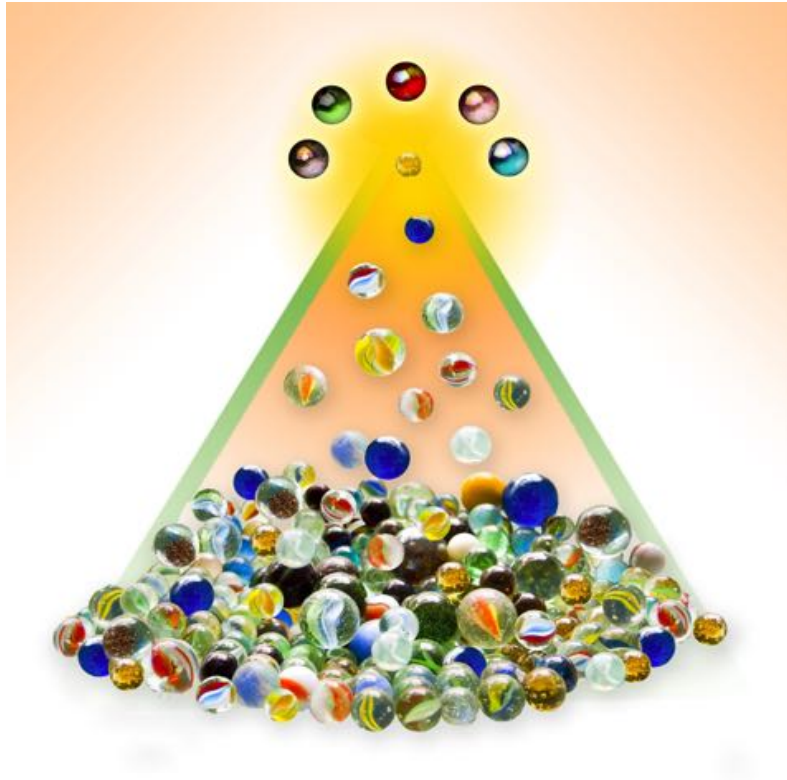
- Score: _____ I have a system and process to generate new business which is part of my regular routine
- Score: _____ I can articulate the 'value' of my product/service to a client's bottom line
- Score: _____ I communicate effectively and listen intently in all business interactions
- Score: _____ I work a sensible schedule and plan regular time away from my business to rejuvenate

Total Growth Number: /20

Growth Percentage: _____

Process

Are all your processes clearly defined?



Process

- Do you have KPI's (Key Performance Indicators) for all areas of your business?
- Do you have SOP (Standard Operating Procedures) you follow?
- Are you comfortable with all financial responsibilities?
- Is your office organized so you can focus and be productive?

What's Your Number? Process

On a scale of 0 - 5. (0 - lowest score; 5 - highest score).

Score: _____ I am very comfortable and confident with all financial responsibilities of my business

Score: _____ I have KPI's (Key Performance Indicators) for all areas of my business

Score: _____ My office environment is organized, efficient, and has minimal clutter, so I can focus

Total Process Number: /15

Process Percentage: _____

People

Do you have the right people on your team?



People

- Do you have a strong company culture?
- Do people comment how much they enjoy working at your practice?
- Does your team have an opportunity mindset to capture future opportunities?
- Can your team confidently articulate why your practice is unique?

What's Your Number? People

On a scale of 0 - 5. (**0** - lowest score; **5** - highest score).

Score: _____ My team and I have developed an opportunity mindset to capitalize on all present and future opportunities

Score: _____ I've developed a company culture that makes us a place where people want to work and where people regularly comment on how much they enjoy working with us

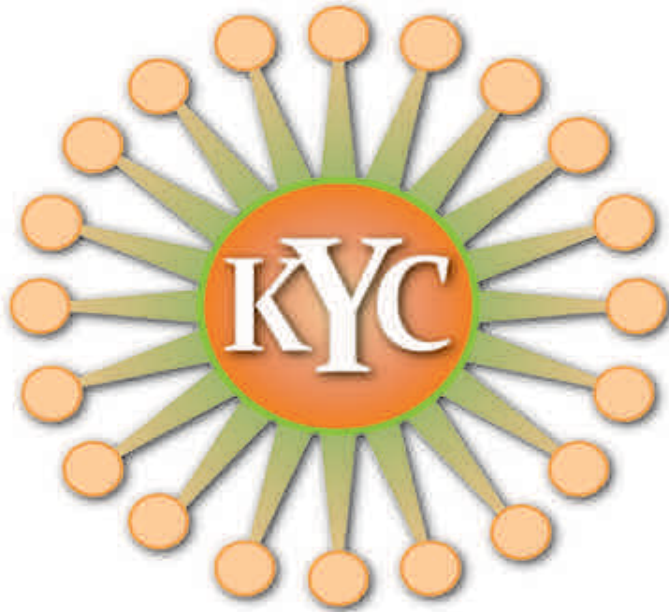
Score: _____ My team and I can clearly and confidently articulate why our company is unique

Total People Number: /15

People Percentage: _____

Customers

Do you really know your customers?



Customers

- Do you have detailed information on all of your key customers?
- Do you know their goals and plans?
- Do you know which customers are in danger of leaving?
- Do you have a follow up system to reconnect with potential new customers?

What's Your Number? Customers

On a scale of 0 - 5. (0 - lowest score; 5 - highest score).

Score: _____ My company only works with customers who value what we do, pay their bills and appreciate our work

Score: _____ I know detailed information on all my key customers; which clients might become our top customers and which clients are in danger of leaving us

Score: _____ I have a follow up system so I can consistently and effectively follow up with each and every potential new customer opportunity

Total Customers Number: /15

Customers Percentage: _____

What's Your Number? Total Number

Add up your score from the 6 sections above and calculate your total number

_____ / 100 TOTAL Number

What will you work on to improve your number?

#1 Priority:

2 Priority:

Break out session

We're going to put you into a small group to collaborate with colleagues

Discuss insights and share your strengths and opportunities

Share 2 top priorities

Have as many people as possible share their ideas

Could your clients' benefit from this scorecard?

6 Key areas

Discussion ideas:



- Vision: Is your vision clear?
- Strategy: Do you have a written plan?
- Growth: Is your growth profitable?
- Process: What processes do you need to improve?
- People: Can your team articulate why you're unique?
- Customers: Do your customers truly understand your value?

Group discussion

Share specific ideas on what you've learned today

Share how you will take action and implement your new ideas

Recap: Next steps

STEP 1

- Review:
- What's Your Number?
- Identify your top priorities
- Pdf version we can gladly send you; also version for your team

STEP 2

- Have your team complete the scorecard
- Share everyone's results and insights

STEP 3

- Create individual plans
- Deepen client relationships
- Share and use this tool with your clients

STEP 4

- We're glad to arrange a customized, one-on-one discussion, to interrupt your 'number' and gladly share beneficial ideas
- Share your contact details

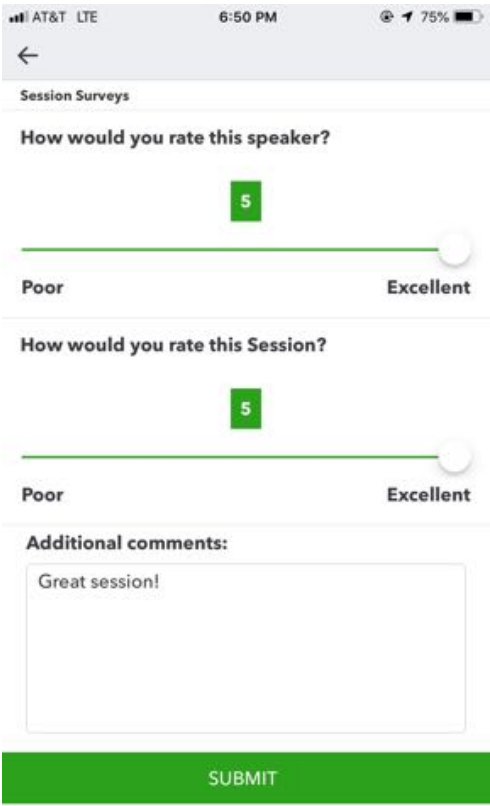
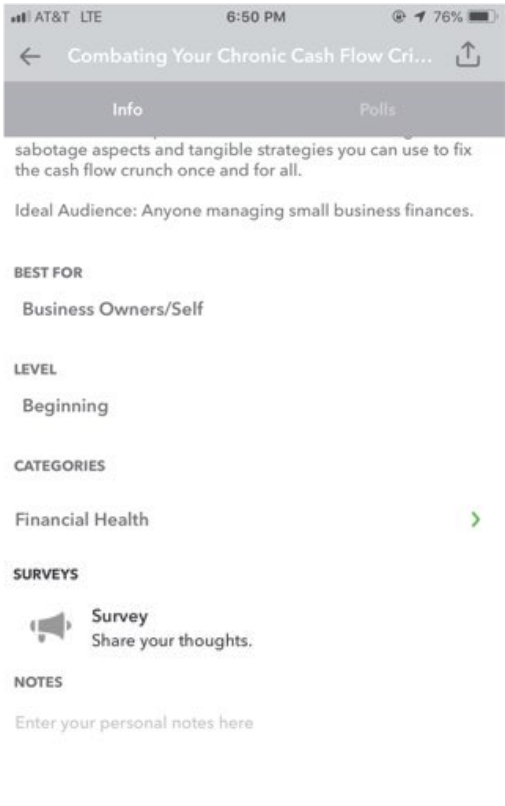
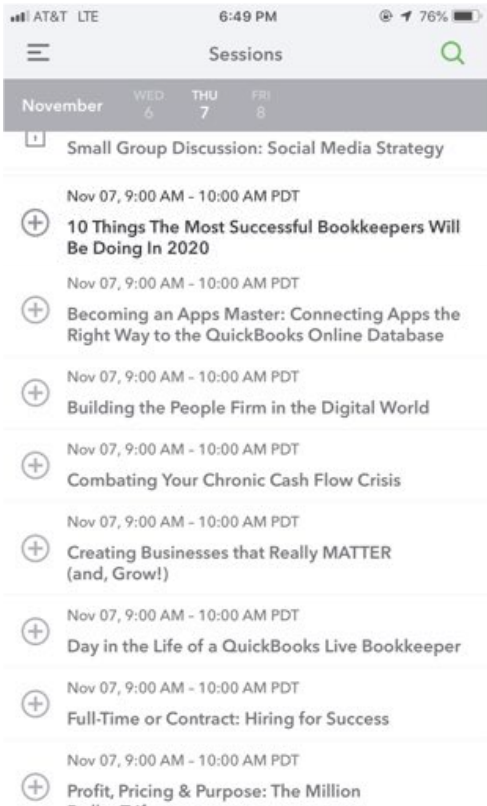
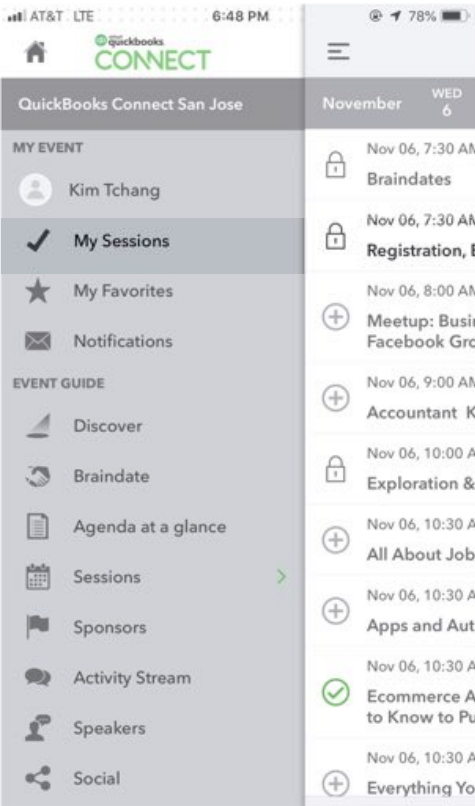


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The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar, filters are listed: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda items are listed in a table-like format with time slots on the left and session details on the right. The sessions include 'Registration, Breakfast & Exploration', 'Braindates' (with a description and 'Learn more' link), 'Yoga', and 'Breakout Sessions' which includes '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', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.

| Time | Session Title | Action |
|---------------|---|--------|
| 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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THE
FUTURE