



# The **ALT**Accountant workshop on positioning, pricing, and innovation

Hector Garcia, CPA



A photograph of two young women with long blonde hair, one in profile and one from behind, engaged in conversation outdoors at night. The background is dark with some green foliage and a soft light source. The text 'Take a minute to connect with your neighbor' is overlaid in white on the right side of the image.

Take a minute  
to connect with  
your neighbor

#QBConnect | WiFi: QBConnect

# 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 **2 hours 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

# Today's speaker



Hector Garcia, CPA  
CEO of Garcia & Company, PA  
@QBKaccounting

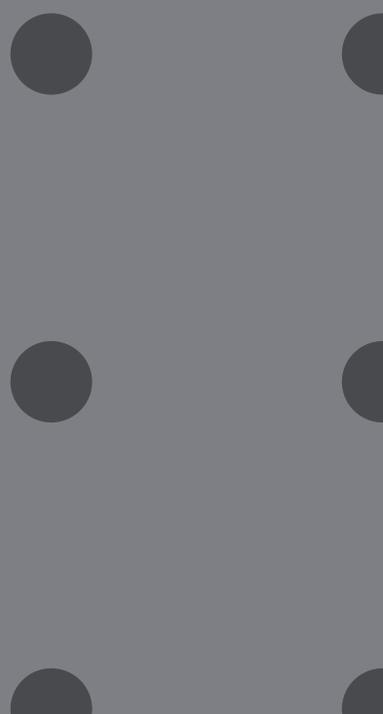
# Agenda

1. The four legs of stool: Quality, pricing, positioning, and innovation (5 mins)
2. Typical accountant stereotypes vs. The **ALT**Accountant (10 mins)
3. Workshop: Create Unique **Positioning** (30 mins)
4. Workshop: **Price** on Purpose (30 mins)
5. Homework **Innovation** workshops (10 mins)
6. Q&A (10 Minutes)
7. Final words (5 Minutes)



# Introduction

From quality, positioning, pricing, and innovation to advisory



**Accounting is about measuring the past**

**Advisory is about shaping the future**

# From “Art of Advisory” to The **ALT**Accountant



16:40 / 36:25



ART OF  
ADVISORY  
PODCAST/INTERCAST

facebook.com/artofadvisory

# The Four Legs of the Stool for a successful “alternative” practice



**ADVISORY**

Positioning

Innovation

Quality

Pricing

# Why focus on positioning, pricing, and innovation

**Unique Positioning** will help you stand out from the everyone else and make you incomparable; which will de-commoditize your services

When you learn to **Price on Purpose**, you focus on what the customer values... which more often than not, it is not the actual accounting or bookkeeping work

When you practice **Disruptive Innovation**, you will challenge your self to think about new problems to solve in unique ways. Create a *monopoly* in your market

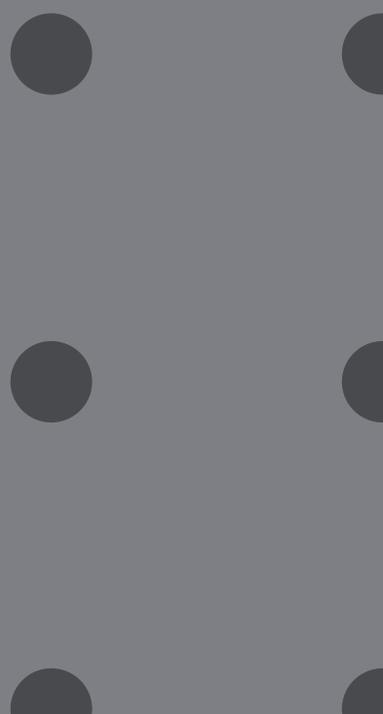
# Why focus on positioning, pricing, innovation

**Quality** of work is a given, your customers need to always assume that you will deliver accurate accounting work

**Advisory:** this is the ultimate service you can perform for your customer; help them make better decisions to grow their business. Help them become better business owners and leaders. Help them **own their future.**



# The **ALT**tidote to accountant stereotypes



**Boring / dull / technical**

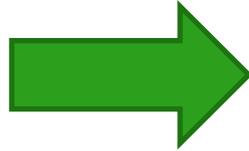
**Generalist**

**Cheap / frugal**



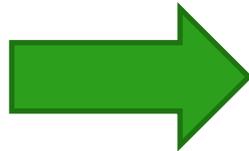
# ALtidote to accountant stereotypes

Boring/Dull/Technical



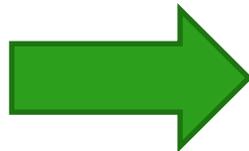
Use laymen terms, terms the customer will understand based on their industry, and talk about **their needs**, NOT accounting concepts

Generalist



Specialize, go deep in a narrow skillset, become authority on something very specific. Be known as an “expert”

Cheap/Frugal



Spend time with your customers. Be “generous” with your time and knowledge, free resources

**The problem with zero sum**



# Typical accountant stereotypes

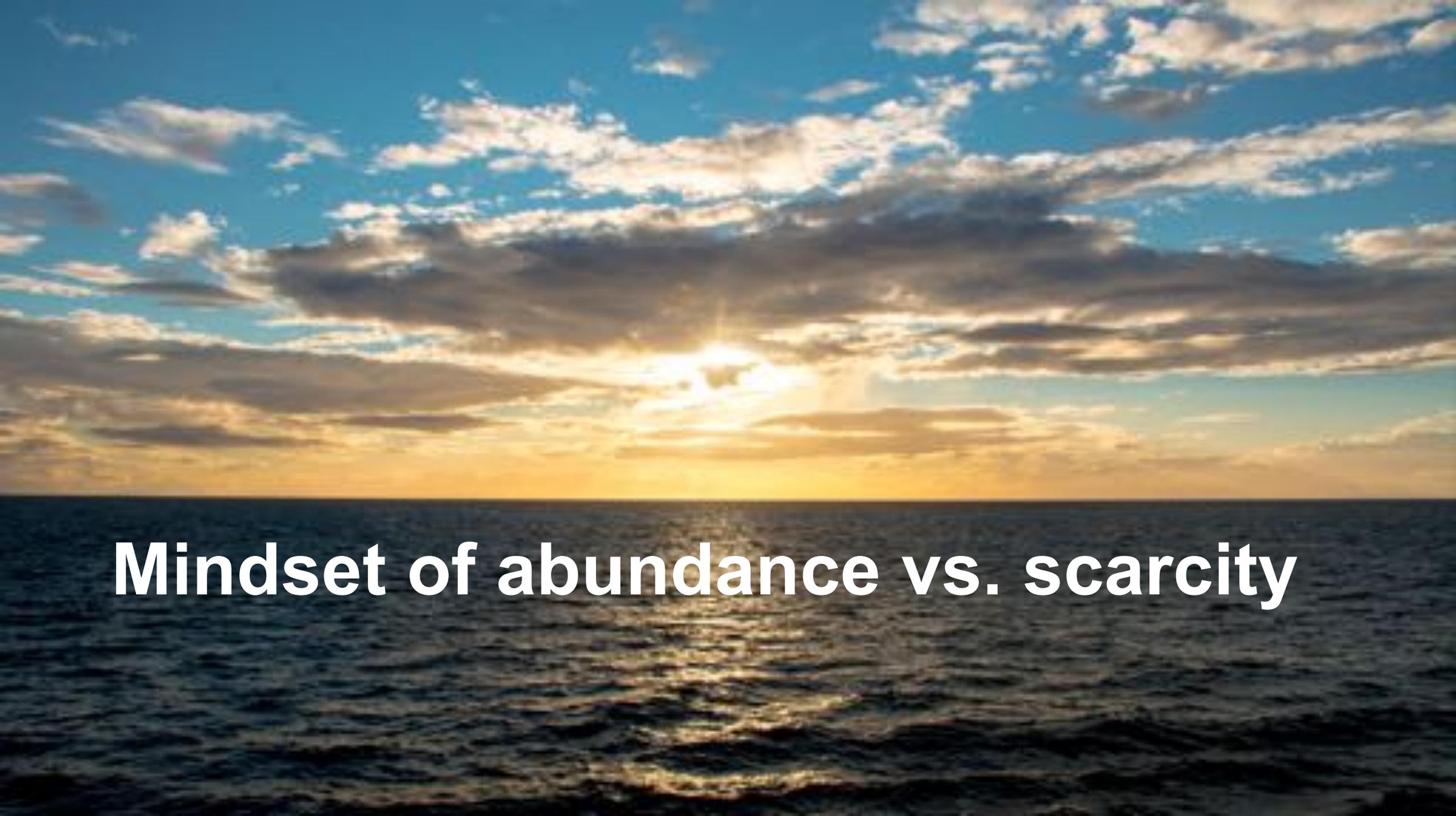
In an accountant's brain: debits always equals credits

Debits and Credits is a zero-sum game

“In the real world debits do not equal credits”

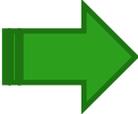
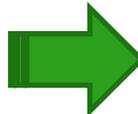
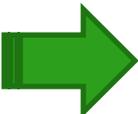
- Ron Baker, Co-Host of the *The Soul of Enterprise Podcast*

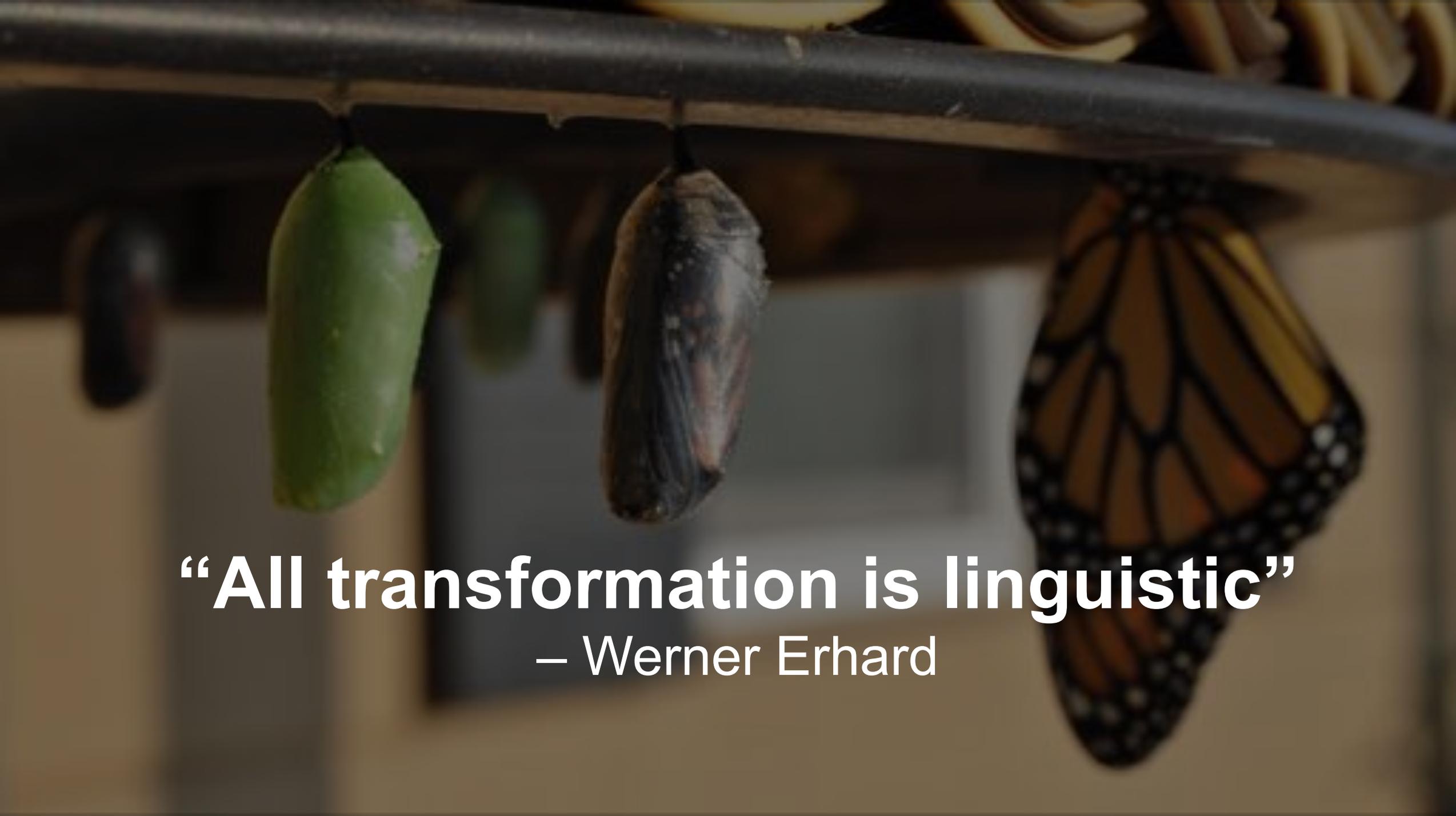
Entrepreneurs (our customers) do not have the spirit of zero-sum, they usually work (or feel that) much harder than what they get in return. And yet, they get up every morning to do it again.

A photograph of a sunset over the ocean. The sun is low on the horizon, creating a bright glow and reflecting on the water. The sky is filled with scattered clouds, some of which are illuminated by the setting sun. The overall scene is peaceful and serene.

**Mindset of abundance vs. scarcity**

# From a scarcity to abundance mindset

			<b>Abundant mindset</b>
<b>Positioning, focus, specialization</b>	<i>“Less total number of potential customers for me”</i>		<i>“More services I can perform for my niche customer base”</i>
<b>Pricing your services</b>	<i>“I better charge for my hard work and clients are too cheap”</i>		<i>“I will charge a fraction for the value I create, my clients will pay for more value”</i>
<b>Disruptive Innovation</b>	<i>“Why change something that works and take unnecessary risks?”</i>		<i>“A new product/service will provide my customers choices and open new opportunities”</i>

A close-up photograph of a monarch butterfly's life cycle stages. From left to right, a small dark egg, a bright green caterpillar, a brown and black chrysalis, and a partially visible adult monarch butterfly with orange and black wings. All stages are hanging from a dark, horizontal branch. The background is a soft-focus indoor setting.

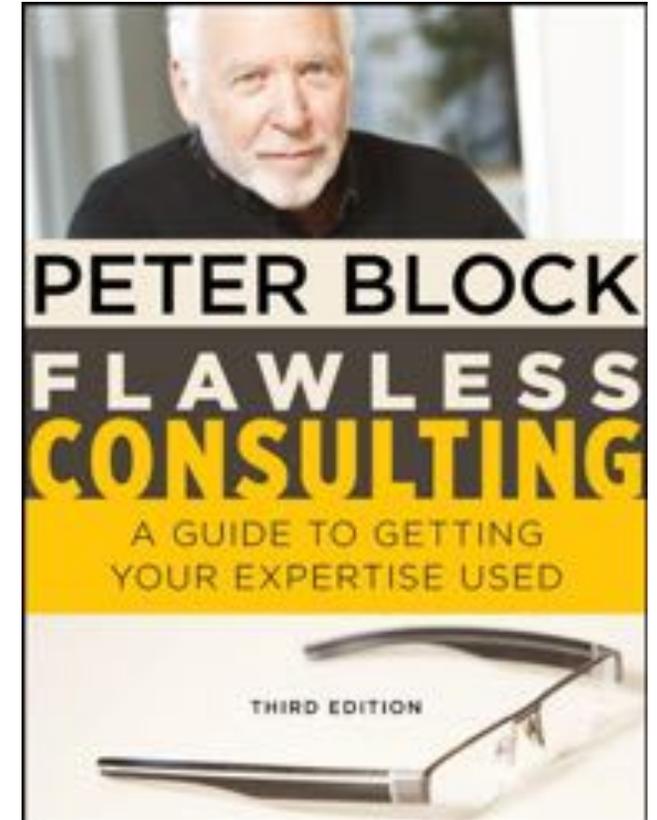
**“All transformation is linguistic”**  
– Werner Erhard

# The ALTAccountant checklist

- ✓ Is hyper focused on becoming best in class in a narrow category, becomes an authority in area of specialization, leverages knowledge
- ✓ Markets to a niche group
- ✓ Is hired as “the subject-matter expert”
- ✓ Is focused in creating value, and charges as fraction of the value created.
- ✓ Takes risks alongside their customers
- ✓ Constantly innovates with new products, services, and processes
- ✓ Uses language/communications to drive change
- ✓ **Designs their present and owns their future**

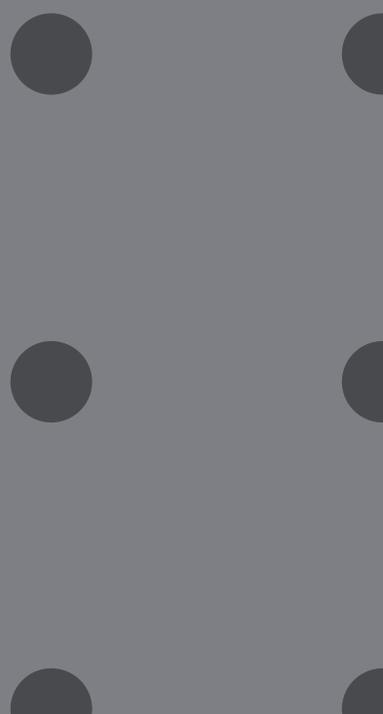
# What role do you play?

- **Pair of hands:** The pair of hands mindlessly follows the client's instructions regardless of whether they actually make sense → *gets paid for effort*
- **Collaborator:** The collaborator partners with the client to define the problem and create and implement the solution.
- **Expert:** The expert swoops in, solves a problem for the client, and then leaves them to move forward on their own → *gets paid for results*





# Workshop: Unique positioning



A close-up photograph of a chessboard with various pieces. The pieces are made of light-colored wood, except for a single dark-colored pawn in the foreground. The pieces are arranged in a line, receding into the background. The text "Unique positioning" is overlaid in white, bold, sans-serif font across the center of the image.

**Unique positioning**

# What is positioning?

Your positioning strategy is best described as what you **do not do**

The customers you **don't take** say a lot more about your firm that then customers you do take

Positioning is about building expertise and being well known as a **master of your craft**

# What is positioning?

Positioning is the space you occupy in your customer's mind

Positioning is how your brand goes from being “different” to being **unique**

# Types of positioning

**Vertical:** industry, size, entity type, partnership composition.

**Horizontal:** type of problem, current unwanted state, future desired state. **Specialized or Unique Skill:** speed, finding errors, adjusting inventory, presentation/reporting

**Vertex:** where you well known for your expertise or specialized skill focused on the vertex of the vertical and horizontal

***(AKA: The expensive problem)***

# Type of positioning

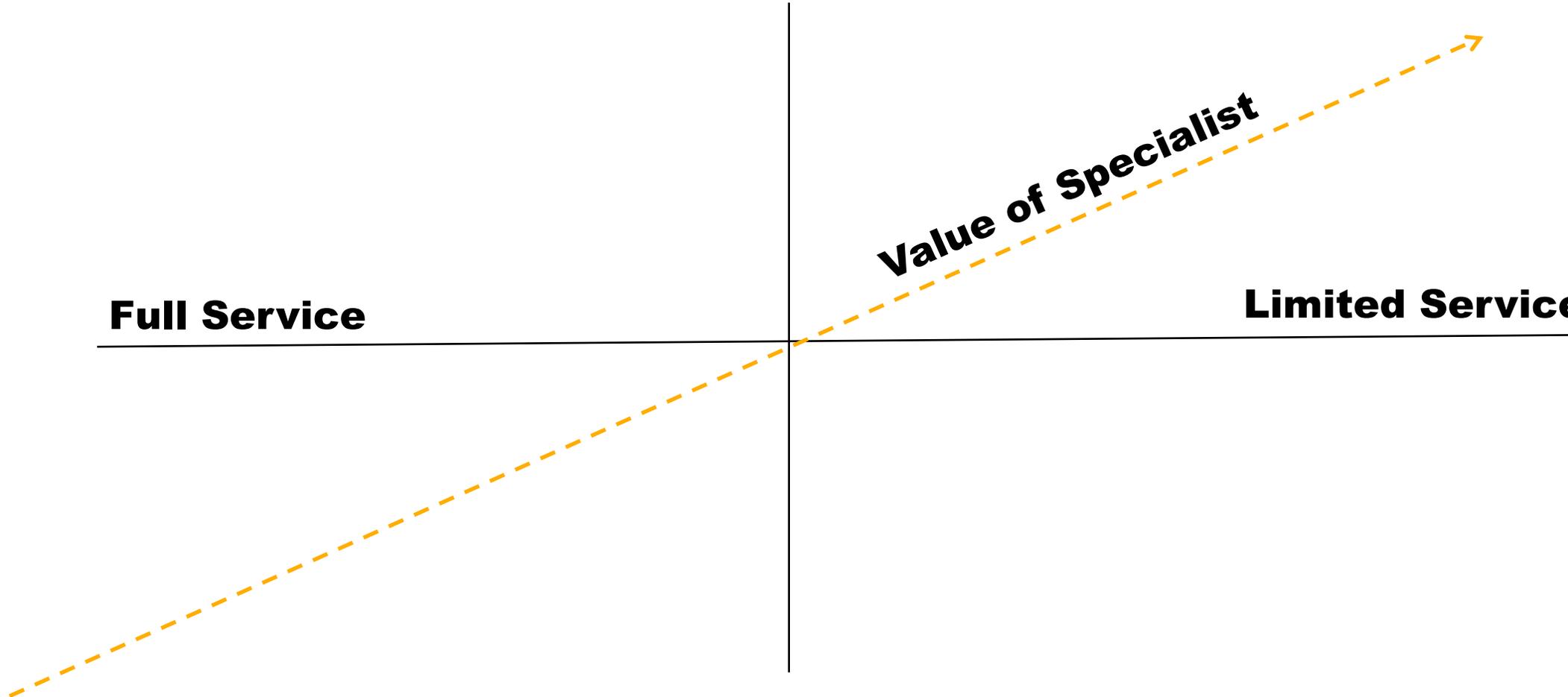
**Narrow Industry**

**Full Service**

**Limited Service**

**Value of Specialist**

**All Businesses & Non Profits**





## **Paul Neal “Red” Adair**

***“If you think it's expensive to hire a professional to do the job, wait until you hire an amateur.”***



# Evolving positioning statement

*“I am an accountant for manufacturing companies”*

# Evolving positioning statement

*“I am an inventory accountant for manufacturers”*

# Evolving positioning statement

*“I am an accountant that specializes in inventory workflow management for manufacturers”*

# Evolving positioning statement

*“I specialize in inventory accounting workflow for manufacturers needing to better understand their margins”*

# Evolving positioning statement

*“I specialize in accounting for Wholesale and Manufacturing businesses”*

# My current in-person positioning statement

*“I help the owners of busy manufacturing businesses take more vacations...”*

*“...by implementing effective inventory workflows that the entire organization follows in real time and produce reports that the business owners can trust”*

# Components of a positioning statement

**Current Undesired State**

*“I help the owners of busy manufacturing businesses take more vacations...”*

**Vertical Focus**

**Horizontal Focus**

**Desired Future State**

*“...by implementing effective inventory workflows that the entire organization follows in real time and produce reports that the business owners can trust”*

**Undesired Current State**

# My story behind my positioning statement

## But why “take more vacations”?

*“When my practice started to get busy, the hardest thing for me was to take a vacation, so I implemented an internal accounting workflow that allowed me to delegate and leverage my team to get more work done without me managing every aspect of the operation...*

*... and manufacturers, like accountants, are in the transformation business – so I naturally, love them”*

# My current social media UPS

*“I am a QuickBooks Consultant for Manufacturers with messy Inventory”*

# My current social media UPS

**Horizontal Focus**

*“I am a QuickBooks Consultant for Manufacturers with messy Inventory”*

**Vertical Focus**

**Undesired Current State**

# Composition of a unique positioning statement

Target customer (vertical)

Specific problems (horizontal)

Current undesired state or pain point

Desired Future State or outcome

Specialized skill (or quick “how”)

$$\frac{dN}{dt} = \frac{1}{q_{\text{fact}}} - \sigma_p(N - N_0)(1 - \epsilon S)S + \frac{N_e}{T_n} - \frac{N}{T_r}$$

$$\frac{dS}{dt} = T_0 \sigma_p(N - N_0)(1 - \epsilon S)S + \frac{N_0 N}{T_n} - \frac{S}{T_r}$$

**The positioning  
statement formula**

$$\left. \begin{array}{l} N - N_0 \\ P_f = (m) \end{array} \right\}$$

# Unique positioning statement examples

I am the **X** for **Y**

**X** = Your role or specialty

**Y** = Your target customer (vertical)

*I am the **cloud accountant for dentists***

# Unique positioning statement examples

I am the **X** for **H** **Y**

**X** = Your role or specialty

**H** = Current problem or structure/status

**Y** = Your target customer (vertical)

*I am the **cloud accountant** for **fast growing multi-location dental practices***

# Unique positioning statement examples

I am the **X** for **Y** that wants **Z**

**X** = Your role or specialty

**Y** = Your target customer (vertical and/or horizontal)

**Z** = Desired Future State

*I am the **cloud accountant** for **dentists** that are looking to **expand to multiple locations***

# Unique positioning statement examples

I am the **HX** for **Y** with **U**

**HX** = Horizontal problem you solve as a specialist

**Y** = Your target customer (vertical)

**U** = Undesired Current State

*I am the **cash-flow advisor** for **dentists** with **messy books***

# Unique positioning statement examples

I solve **U** for **Y** as their **X** by doing **H**

**U** = Undesired Current State

**Y** = Your target customer (vertical)

**X** = Your role or specialty

**H** = Specialty/problem to solve

*I solve **cash flow issues** for **dentists** as their **Virtual CFO** that **provides real-time reports***

# Unique positioning statement examples

I bring **Z** to **U** **Y** through **H**

**Z** = Desired Future State

**U** = Undesired Current State

**Y** = Your target customer (vertical)

**H** = Current problem/status (horizontal)

*I bring order & clarity to multi-location dental practices with real-time accounting reports*

# Unique positioning statement examples

I help **U** **Y** with **H** so they can **Z**

**U** = Undesired Current State

**Y** = Your target customer (vertical)

**H** = Current problem/status (horizontal)

**Z** = Desired Future State

*I help **fast growing dental practices** with their **real-time accounting reports** so they can focus on **making their patients smile***

# Unique positioning statement tips

Your customer is the hero and you are their guide

Tell the journey of transformation

Your belief system and brand must be felt

Your expertise should be obvious

You love what you do, so it should come from a place of passion

Your customer's needs are most important to you

Desired outcomes should be understood

Must stand for something of high value for you and your customer -> **FOCUS  
ON THE EXPENSIVE PROBLEMS**

# Unique positioning statement formula legend

**H** = Current problem to solve or structure/status

**X** = Your role or specialty

**Y** = Your target customer (vertical)

**U** = Undesired Current State

**Z** = Desired Future State

# Workshop

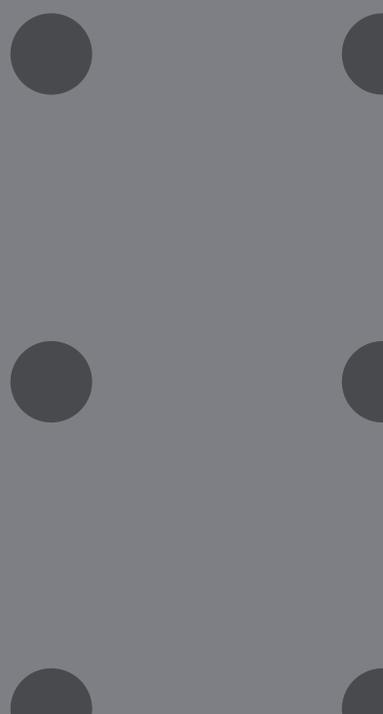
## *30 mins*

1. Draft your own UPS, try 2-3 different options
2. Get together in group of 3 people and practice it
3. Give each other feedback





# Workshop: Price on purpose



The background is a grayscale, slightly blurred image of a document. A ruler is visible, with markings and the word "FEDERAL" printed on it. Cyrillic text is scattered across the page, including the numbers "217781" and "421781".

**Price on purpose**

# Keys to pricing

Confidence in your own abilities

Reputation and brand

**Understanding the source of value with the Value Conversation**

Price as fraction of the value you can create

Offer a guaranteed outcome



# Value conversation

Asking the initial key WHY's:

Why Me?

Why Now?

Why This?

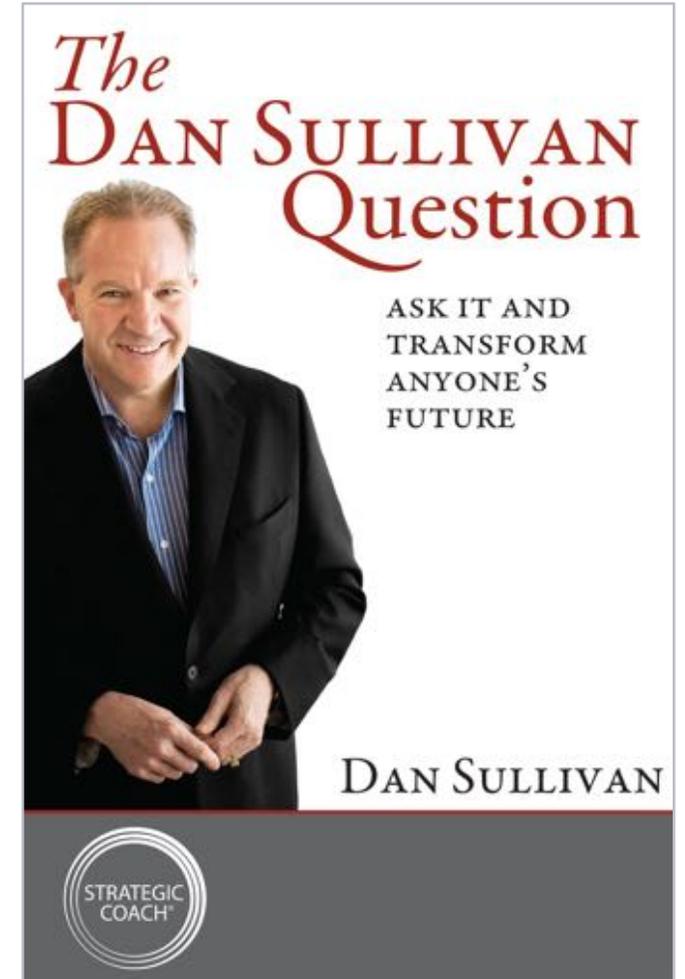
*Why Not?*

From “Value-Based Fees” by Alan Weiss



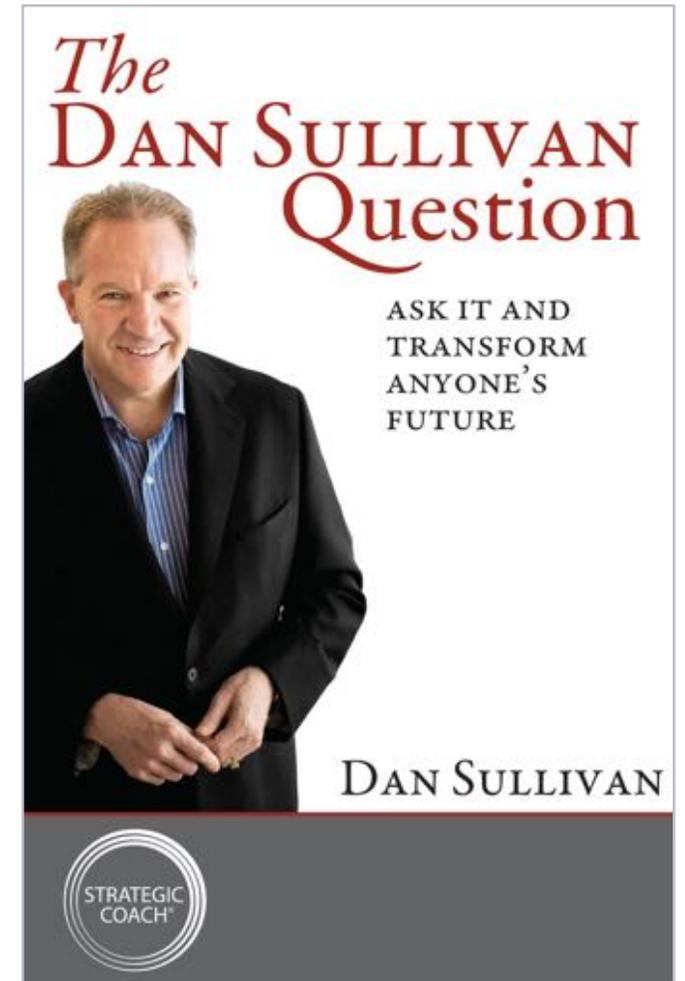
# The ultimate value-based question:

*“Imagine If we were having this discussion 3 years from today, and you were looking back over those 3 years, what has to have happened in your life both personally and professionally, for you to feel happy with your progress?”*



# The ultimate value-based question:

*“Imagine If we were having this discussion 3 years from today, and you were looking back over those 3 years, what has to have happened in your life both personally and professionally, for you to feel happy with your progress?”*”



A photograph of the Walt Disney statue and Mickey Mouse statue in front of Cinderella Castle at Walt Disney World. The image is dimmed and has a blue tint. The statue of Walt Disney is on the left, wearing a suit and glasses, with his right hand raised. Mickey Mouse is on the right, wearing his signature red shorts and shoes. The background shows the iconic architecture of Cinderella Castle with its blue and white facade and gold spires.

***“If you can dream it, you can build it”***

– Walt Disney

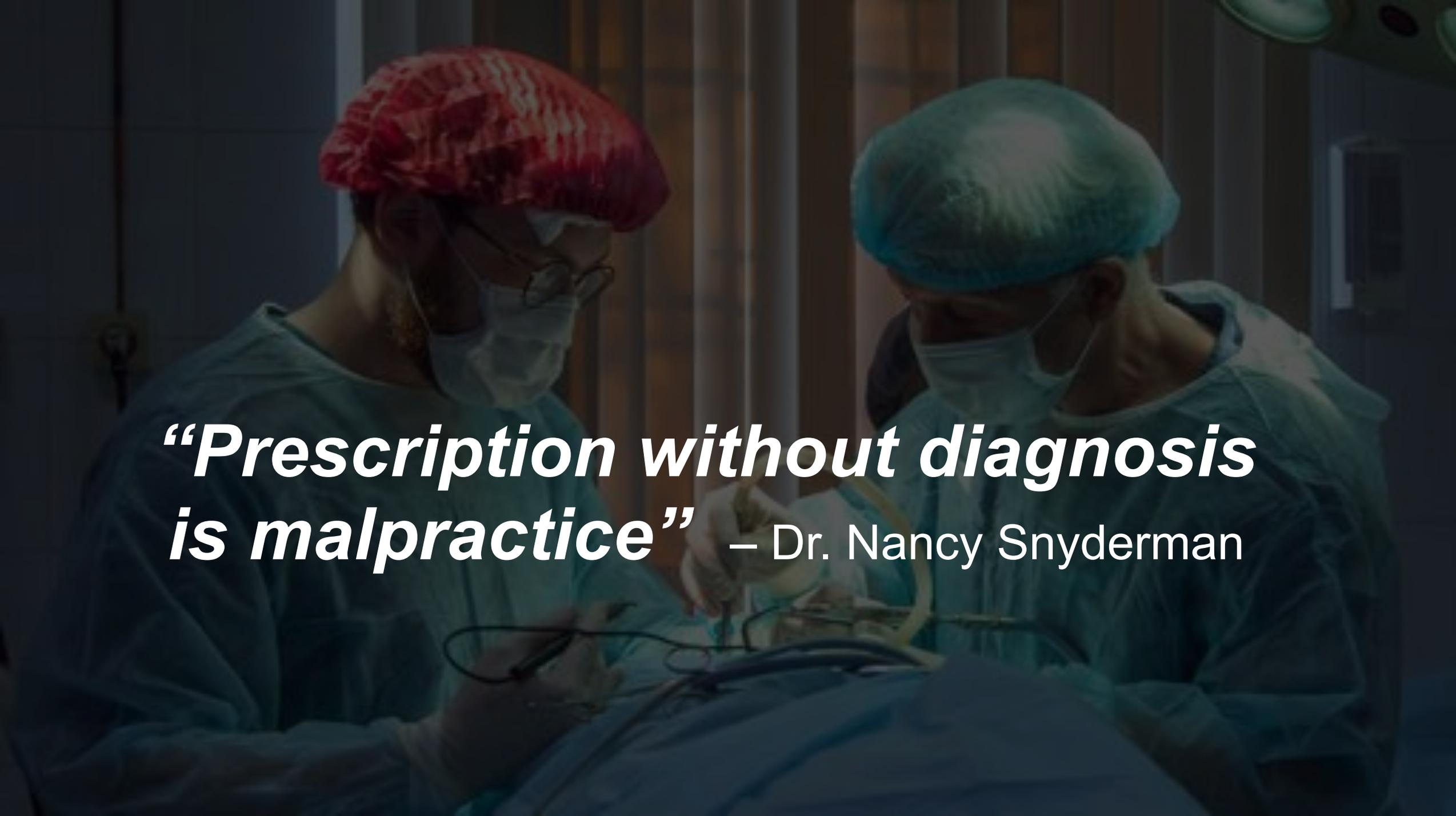


**The value conversation**  
**Peeling the onion**

# Understanding source of value

I need you to fix my inventory

1. **What makes you say that?** – My inventory QTY's are all wrong
2. **Why is that a priority?** – Because my Inventory Asset and COGS is wrong
3. **Why is it so important to fix?** – Because I need to know my gross margins
4. **And how will accurate margins help you?** – I can pay my sales commissions accurately and on time
5. **And what kind of issues have that caused?** – I lost my top sales person last month and I suspect is because we always had errors in the commissions and took forever to reconcile

A photograph of two surgeons in an operating room, wearing masks and hairnets, focused on a procedure. The image is dimly lit with a blue tint. The text is overlaid in white, bold, italicized font.

***“Prescription without diagnosis  
is malpractice”*** – Dr. Nancy Snyderman

# Understanding source of value

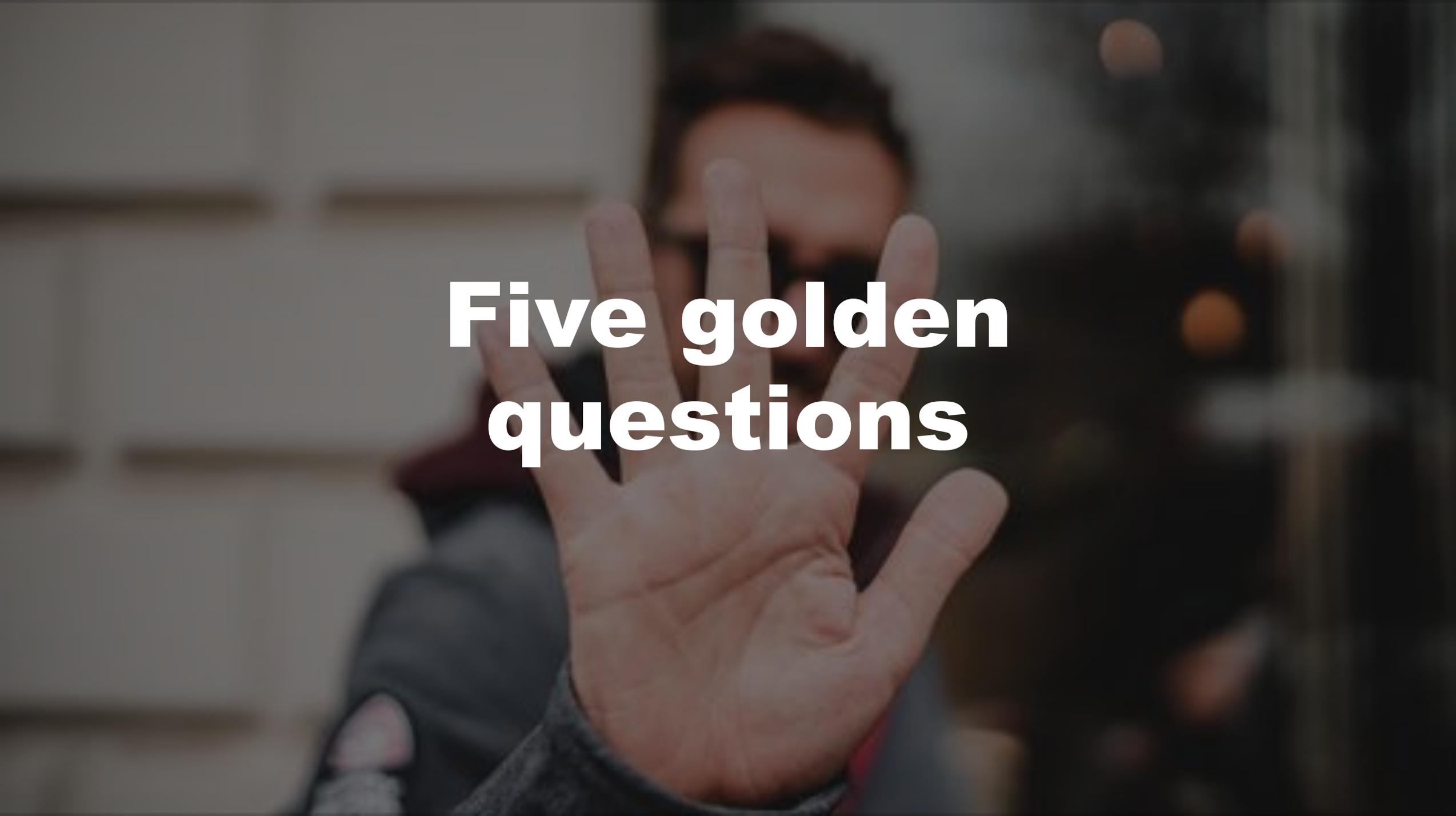
**So what is the cost of losing your top sales person?**

*“20% decrease in sales and \$10,000 less bottom line”*

*“Training new sales people: \$5,000”*

*“Anxiety about losing more customers to the competition”*

(priceless)

A close-up photograph of a hand with five fingers spread, palm facing forward. The hand is the central focus, with a person's face blurred in the background. Overlaid on the hand is the text "Five golden questions" in a bold, white, sans-serif font. The background is a blurred indoor setting with warm lighting and bokeh effects from lights in the distance.

# Five golden questions

# Measuring the VALUE of the solution

## Mahan Khalsa's 5 Golden Questions:

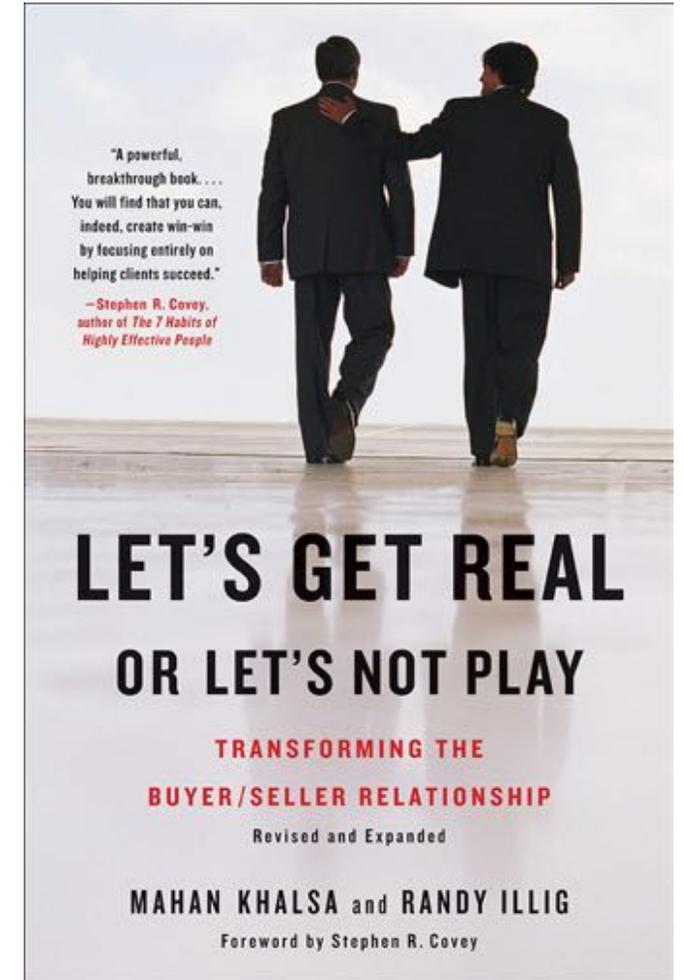
How do you measure the problem?

What is it now?

What would you like it to be?

What is the value of the difference?

What is the value over time (typically 2-3 years)?



# Workshop

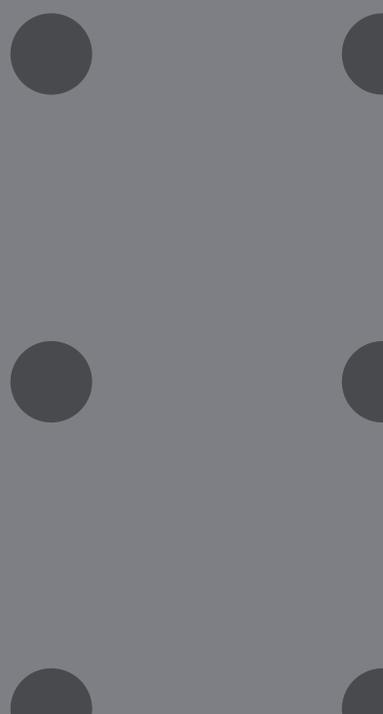
## *30 mins*

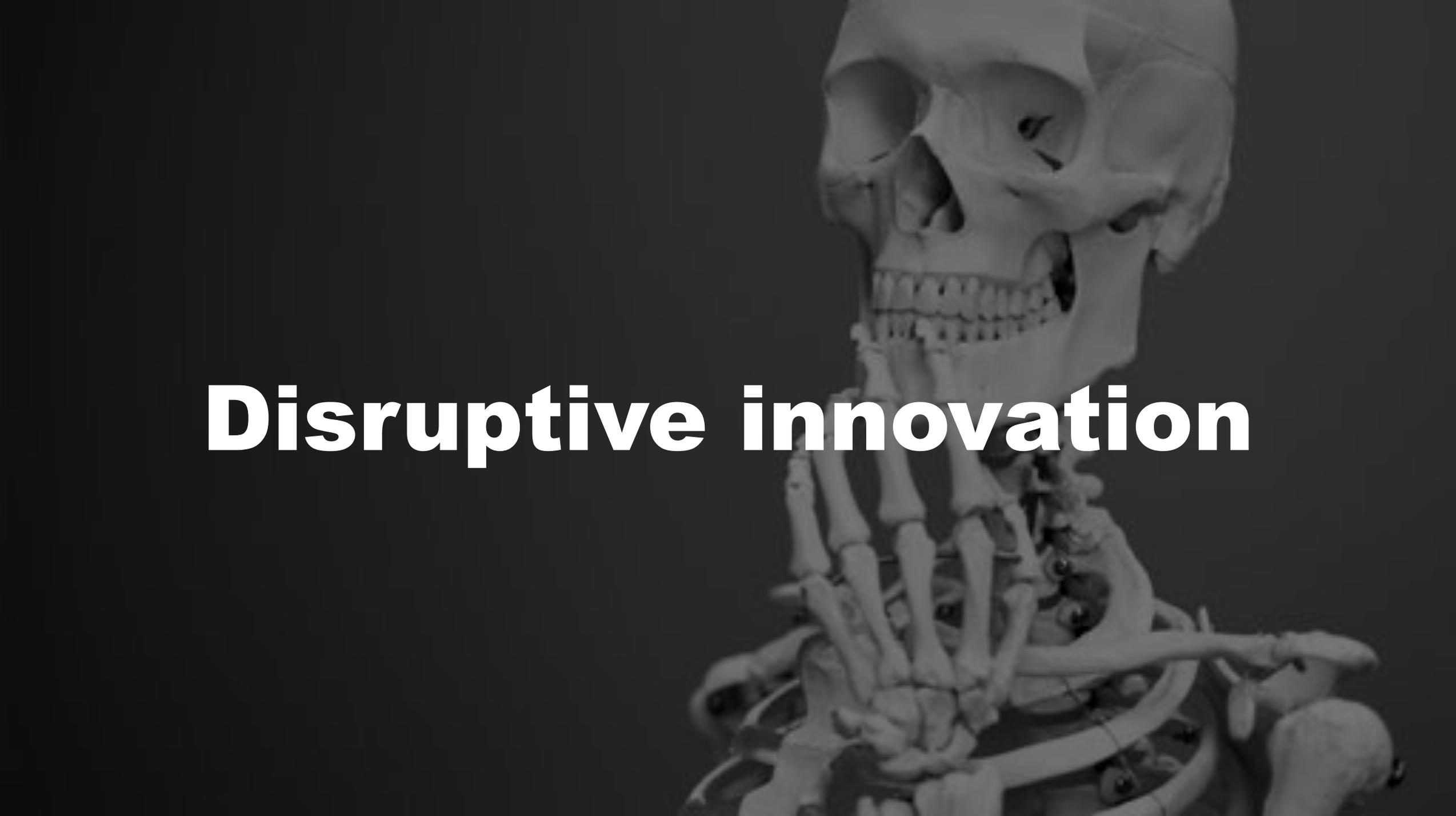
1. Get together in group of 3 people
2. Each of you think of a typical customer's first request like "I need you to reconcile my banks, how much are your fees?"
3. Ask 2 to 5 "Why Questions" to get to the bottom line pain point
4. Once the pain point is identified; go through the Mahan Khalsa 5 Golden Questions to identify the value from the results of your work





# Home workshops on innovation





# **Disruptive innovation**

# Disruptive innovation workshops

Productized services

Leveraging the subscription model

A person wearing a blue uniform is holding a large, brown cardboard box. The box has a white shipping label with a yellow barcode on the side. The background is a blurred outdoor setting with green grass and a blue sky. The text is overlaid in the center of the image.

**Homework innovation  
Workshop: Productized service**

# Build a productized service

Think of the most common (medium complexity) services you perform for most your clients during the first year of working with them

Think about the hardest (high complexity) services to predict how long it will take

Think about the top things (easy wins) you do for clients that makes them feel great and are not time consuming to your firm

Pick the ones with the most relevancy and pick it as your next productized service

# Productized service brainstorming

<b>Complex Services</b>

<b>Most Common Services</b>

<b>Easy Wins</b>

# Productized service brainstorming

## Complex Services

Clean-up the whole year of accounting  
Training a an internal bookkeeper  
Move operations to the cloud  
Build an auditable document archive  
Representation or support during an audit

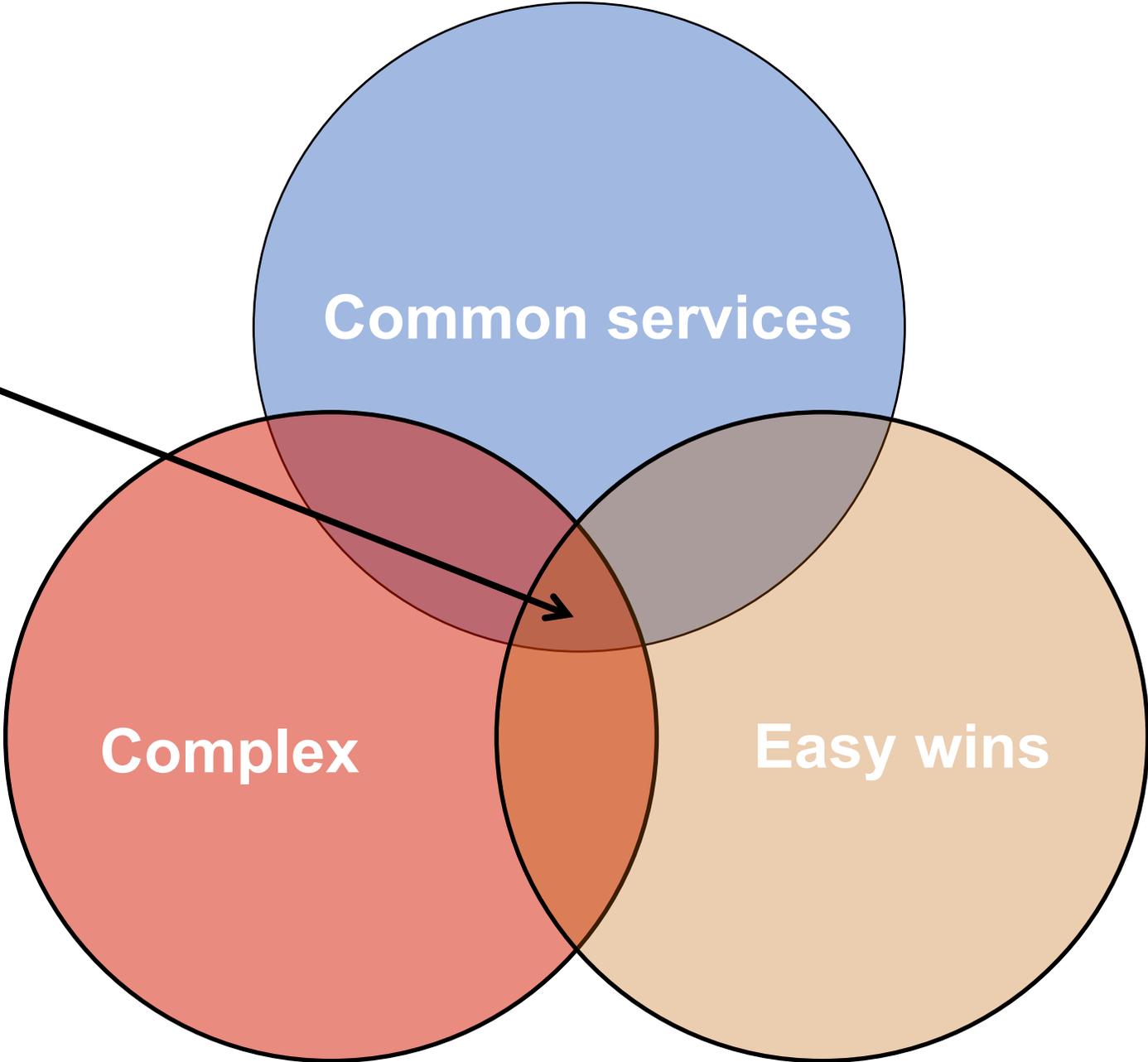
## Most Common Services

Organize Chart of Accounts  
Clean up A/R Aging, A/P Aging, and Inventory Valuation  
Analyze entity choice (Corp, LLC, Partnership, Sole Prop, S-Corp vs. C-Corp, State Nexus, etc.)  
Educate owner on what they need to do in QuickBooks and/or record keeping  
Teach client how to read financial reports

## Easy Wins

Find useless/redundant expenses  
Customize Invoice (colors & logo)  
Connect their banks to QuickBooks Online  
E-sign / E-File tax returns  
E-mailing documents they requested immediately  
Registering a fictitious name  
Identify top items sold or top customer sales  
Answer an e-mail with a phone call immediately  
Summarize results from phone conversation

Optimal productized service



# Productized service brainstorming

Describe what your most happy clients feel great about using of your services

Peace of mind about accurate books

Peace of mind that there will be no penalties from compliance

Increase effectiveness because they have better decisions support data

Transformed client to focus on profit, save money long-term goals, reinvest profits into high ROI expenses

Improved cashflow from improved pricing, invoicing presentation, and collections process

Relief from tedium of bookkeeping

Feeling of ready to take over the books

# Identify “Job to be done”

A productized service needs to have a defined “job to be done”

It is beyond what the customer communicates to be what they want/need

“Job Done” is the desired and guaranteed outcome



# Build your productized service

1. Select 3 to 6 items from Complex/Common/Easy Boxes (at least 1 from each)
  - Clean-up whole year of books
  - Organize Chart of Accounts
  - Clean-up A/R and A/P
  - Find useless/redundant expenses
2. Pick top 2 feelings from happy clients after your services
  - Increase effectiveness because they have better decisions support data
  - Feeling of ready to take over the books
3. Give it a unique name

# Go to market with your offer

## Total Quality Cleanup Service for Manufacturers

With this service **you will have** totally clean books\* up to the current month, an organized Chart of Accounts, accurate accounts receivables and accounts payables, and in-depth analysis of all your expenses/purchases by category and payees

Guaranteed to make you most effective by giving you accurate financial reports so you can make better and more timely decisions. And be 100% ready to take over the books with moving forward.

*Project completion time 30-60 days*

*\*See our project scope guideline for details*

# \$899

# Homework Workshop

1. Draft your own productized service offering that is for a **one-time service** with a finite target / “job to be done”
2. Give it a unique name
3. List the scope limitations (what is NOT included)
4. Get with a friend or colleague to discuss ideas



# \*Build Your project scope guidelines

We must have discreet access to QuickBooks file 24/7 during project

Customer must provide all requested documents before we commence the work

Data entry for missing transactions will be created by customer (we will send you that list and guidelines)

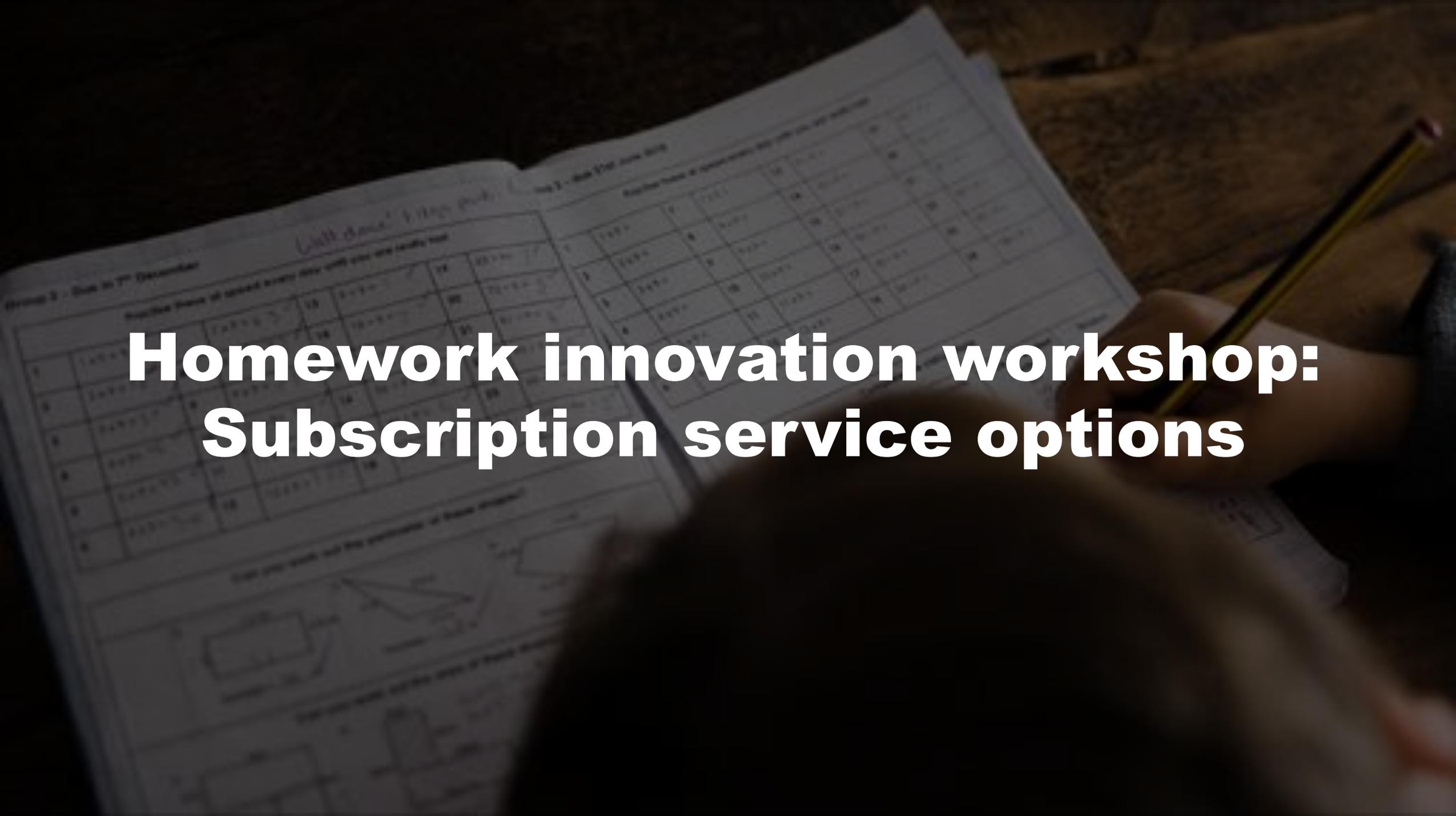
We will delete all redundant transactions and provide accompanying report, it will be the customer's job to reconstruct any relevant information from those deleted transactions if they need it

We will use banks and credit cards to reconcile accounts, customer is responsible for entering/reconcile cash-based transactions

No training or user support will be included during the clean-up project

We will be closing the periods as we complete and customer will not be able to modify those transactions

Price based on 6 months of data



**Homework innovation workshop:  
Subscription service options**

# Create a subscription service

This is the second step after successfully completed/delivered Productized Service

Create a maintenance/support plan to service the productized service year long

Build a list of the 10-15 things you do best for your customers and could do it periodically

Create 3 possible prices you want to charge and give each option a unique name

# Build your 3 subscription options with prices

Build backwards:

- Create your 3 tiers first (desired prices to charge)
- Name the services
- Then figure out the scope/offering

<b>Accurate Bookkeeping Service</b>	<b>Bookkeeping &amp; Compliance Plus Service</b>	<b>All Access Accounting &amp; Advisory Service</b>
<b>\$500</b>	<b>\$900</b>	<b>\$1,500</b>

# Brainstorm top services included in monthly subscription

Answer any of your accounting questions

Correct errors you create

Making adjusting journal entries at end of period

Reconcile account statements you couldn't get to

Spot check (another word for "Audit") the source documents to determine correct categorization

Visit with you in person to discuss numbers

Prepare Sales Tax Returns

Verify Payroll forms before filing

Discuss your financials with 3<sup>rd</sup> parties

Deductions and Taxable Income Planning

Update Budget and Forecast – Monitor Budget vs. Actual Reports

# Put services and variations in buckets

**Tier 1**

Service Name:
Price:

**Tier 2**

Service Name:
Price:

**Tier 3**

Service Name:
Price:

# Put services and variations in buckets

## Accurate Bookkeeping Service

Answer all your questions via e-mail within 3 biz days

Make adjusting entries annually

Reconcile client prepared payroll and sales tax to books

Annual meeting to review accounting

**\$500**

## Bookkeeping & Compliance Plus Service

Answer all your questions via e-mail by next business day

Make adjusting entries quarterly

Assist with preparing sales tax forms and payroll tax forms

Quarterly meeting to review accounting and forecast tax estimates

**\$900**

## All Access Accounting & Advisory Service

Answer all your questions via phone within 2 days (if requested)

Make adjusting entries Monthly

Prepare sales tax forms and payroll tax forms, guaranteed penalty-free

Monthly meeting to review accounting, budgets, and estimated taxes

**\$1,500**

# Homework Workshop

1. Draft 3 service offerings with different scope and outcomes for **ongoing services**
2. Give each one unique name
3. Think of price ranges for each one with scaling values
4. Get with a friend or colleague to brainstorm on your offerings



# Value pricing vs. Productized services vs. Subscriptions

Value pricing is about customizing the price of every custom job/project based on the value we provide to the customer AFTER a Value Conversation

Productized Services is about getting new clients in the door based on a predetermined “job to be done” (quick outcomes) Before a Value Conversation

Subscription is about merging the two concepts to build a portfolio.

Subscribed customers you be the only one with access to the most valuable resource you can offer:

**Ongoing Transformative Advisory**

# Positioning, pricing, and innovation in summary

Define the focused target market where you want specialize in

Create your unique positioning statement will help you communicate what you do, how you do it, who you do it for and the value you create

For custom projects, price your services AFTER you know what is value you are going to create (price on purpose)

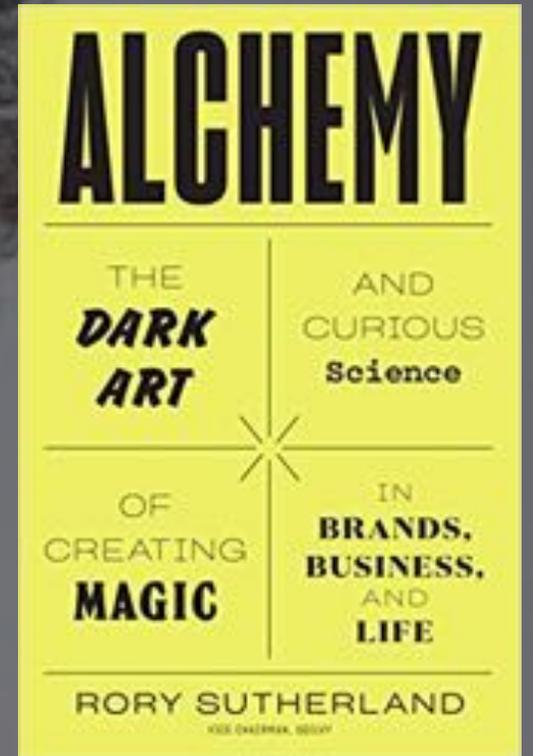
Create a productized service to get your customers quickly “in the door”

Offer an ongoing subscription to maintain/grow the value created via the productized service

Provide Advisory services only to your subscribed customers either as an added value or add-on

*“The opposite of a good idea  
could also be a good idea”*

– Rory Sutherland author of Alchemy



# Questions

# The ALTAccountant manifesto

We are uniquely positioned to help your target customers

We are known as the experts in our specialty

We strive to understand why and desired outcomes

We price below the value we provide

We give our customers choices

We strive to be effective even at the risk of being inefficient

We believe that there is always more...

**We control our present, so we can own our future**

# Additional resources:

[HectorGarcia.com/QBC19](https://HectorGarcia.com/QBC19)

The screenshot shows the website for Hector Garcia, a CPA and QuickBooks Consultant. The page is titled "QBC19" and features a navigation menu with links to Home, Services, Contact, Projects, Resume, Webinars, and Advanced. There are also social media icons for Facebook, Twitter, LinkedIn, and Instagram. The main content area is divided into several sections:

- Print Workshop Sheet:** A link to <https://hectorgarcia.com/altaccountant-workshops/>.
- Additional Video Resources:** A list of video links including:
  - AltAccountant philosophy (26 min video)
  - Drafting a unique positioning Statement (33 min video)
  - Offering options when pricing fixed rate services (16 min video)
  - Design a Productized service (10 min video)
  - Why we need a Manifesto (37 min video)
  - Implementing Change (10 Min video)
  - Hector's Value Pricing and Value Creation Webinar Recordings (2 hours)
- Downloadable Resources:** A list of downloadable documents including:
  - Workshop worksheet from QBC19
  - Hector's Value Pricing Cheat Sheet
  - Hector's Bookkeeping Questionnaire
  - Hector's Service Agreement Level
- Recommended Podcasts:** A list of podcast episodes including:
  - AltAccountant Podcast by Hector Garcia
  - Art of Value by Kirk Bowman
  - The Soul of Enterprise by Ron Baker and Baker
  - Pricing is Positioning by Paul Klein III
  - ZBob by Blair Enns and Craig T. Baker
  - Friday Night Live by Hector Garcia, Michael Ly, and Andrew Wall
  - Cloud Accounting Podcast by David Leary and Blake Oliver

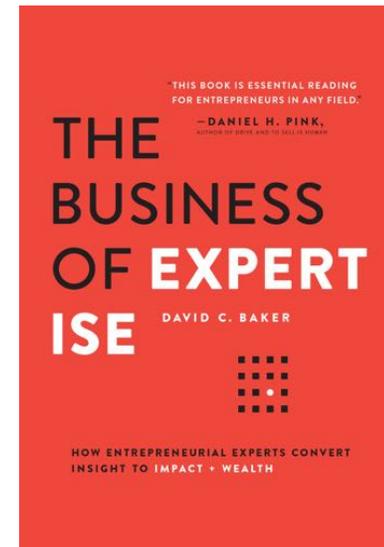
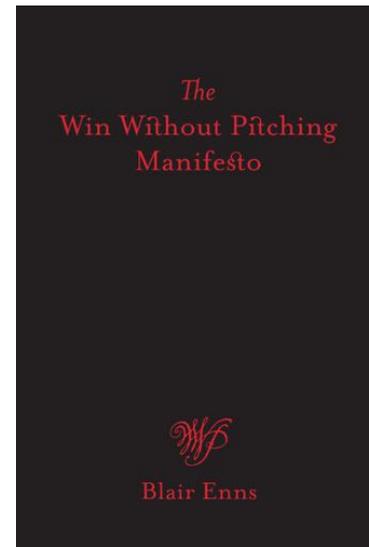
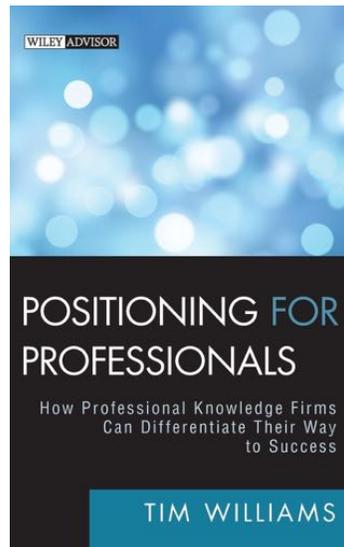
On the right side of the page, there is a search bar and a "Recent Comments" section listing several comments from users like Elio Soto, Sue, Admin, Elena, Rosanna, Johnny, Admin, and Linda.

# Books on positioning

Positioning for Professionals by Tim Williams

Win Without Pitching Manifesto by Blair Enns

The Business of Expertise by David. C Baker

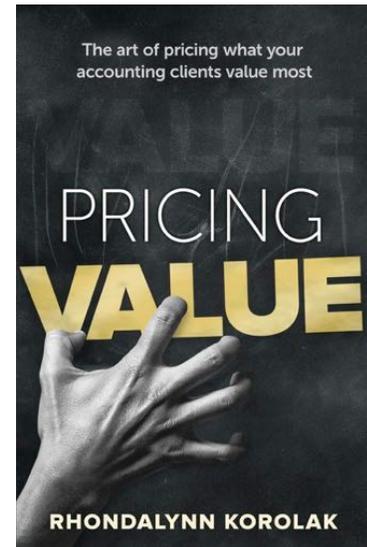
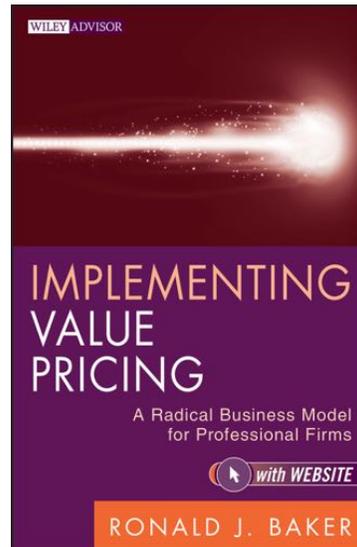


# Books on pricing

Implementing Value Pricing by Ron Baker

Pricing Value by Rhondalynn Korolak

Price: The fastest way to change profits by Mark Wickersham

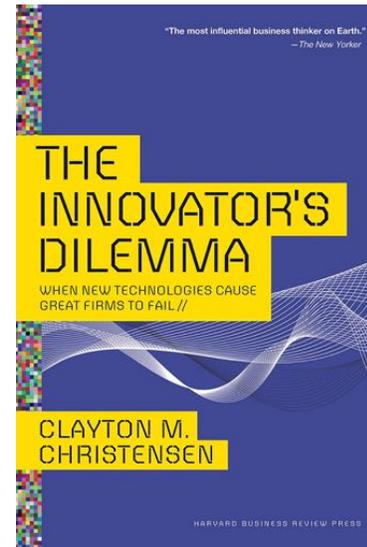
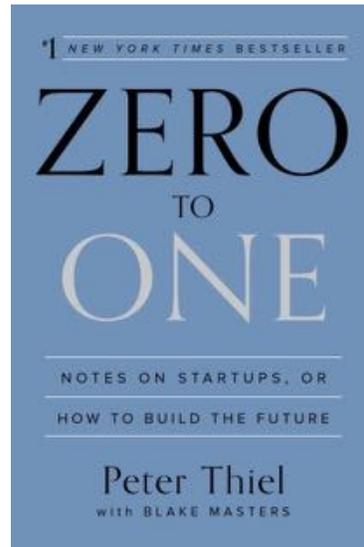


# Books on innovation

Zero to One by Peter Thiel

The Innovator's Dilemma by Clayton Cristensen

The Experience Economy by Joseph Pine



# My favorite Podcasts

**AltAccountant Podcast**

**Friday Night Live with Accountants** (*Live on FB on Fridays @11:30pm EST*)

**Art of Value Show**

**The Soul of Enterprise**

**Cloud Accounting Podcast**

**2Bobs**

**Pricing is Positioning Podcast**

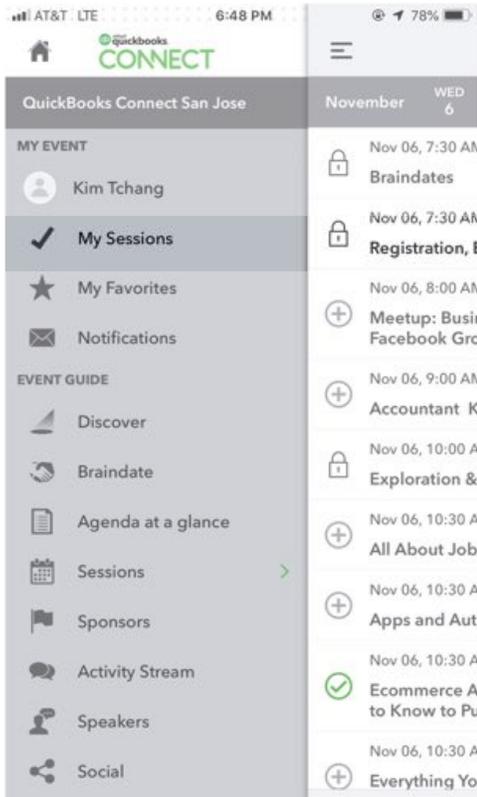
**Ditching Hourly**

**The Business of Authority**

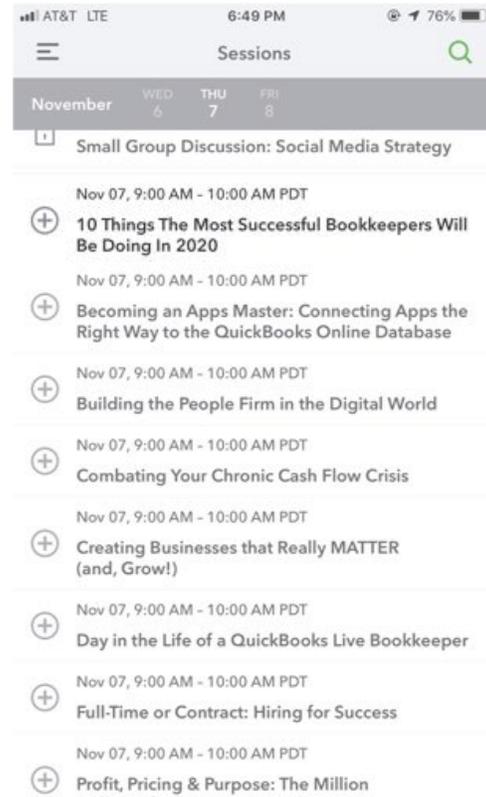
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

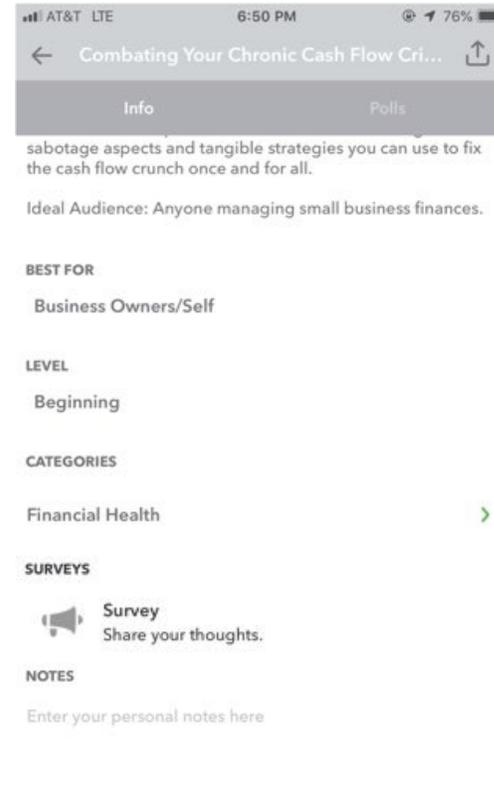
## 1. Select Sessions



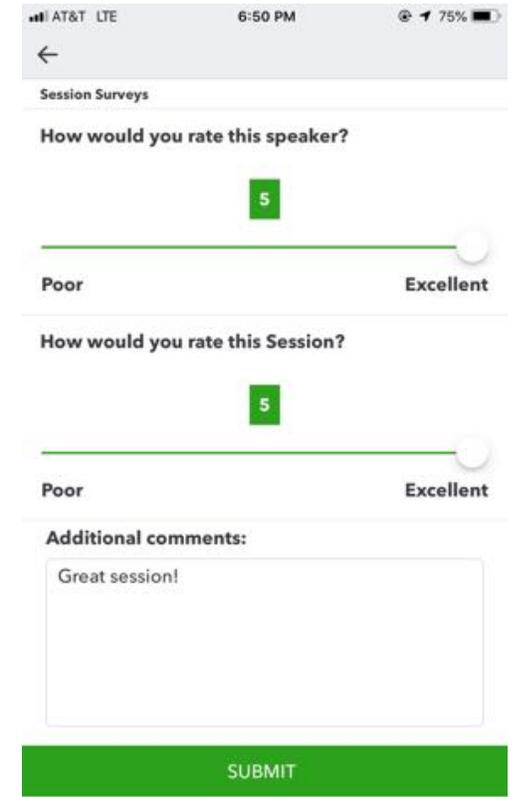
## 2. Select Session Title



## 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 page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (which is selected), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. The agenda items for November 7 are listed as follows:

- 7:30-9:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: **Braindates** (marked with an 'x'). Description: '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 (marked with a '+')
- 8:00-8:45 am: **Breakout Sessions**
- Small Business Meetup: Relationship Marketing and the Power of Human Connection (marked with a '+')
- Small Group Discussion: Social Media Strategy (marked with a '+')
- Small Group Discussion: Showing up - Why What You Wear Matters (marked with a '+')
- Small Group Discussion: Build Your Dream Bookkeeping firm (marked with a '+')

 **CONNECT**

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THE  
FUTURE  
FUTURE