




Building a framework for a successful bookkeeping practice

Suzanne Haynes



A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, wearing a dark jacket with a light-colored fur collar. The woman on the right is seen from the back, looking towards the left. The background is dark and out of focus, showing some green foliage. The text "Take a minute to connect with your neighbour" is overlaid in white on the right side of the image.

Take a minute
to connect with
your neighbour

#QBConnect | WiFi: QBConnect

CPD Process

In order to receive CPD 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 CPD**
- CPD 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



Suzanne Haynes
Owner: Bookkeeping Solutions
@suzanne_haynes

Agenda

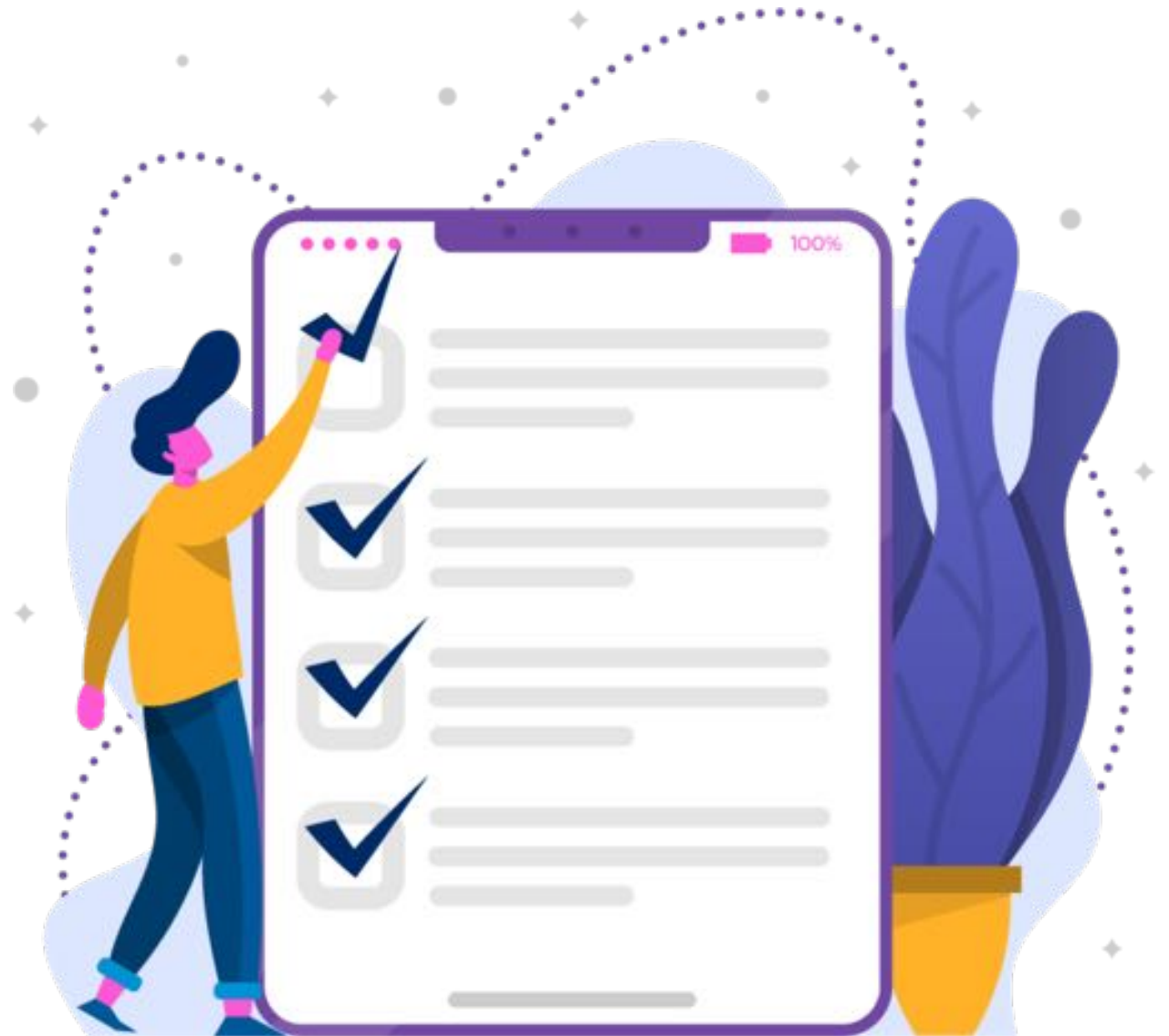
Introduction

Define the Framework

- Phase 1
- Phase 2
- Phase 3

Putting it all together

Conclude





There are two things that are more difficult than making an after-dinner speech: climbing a wall which is leaning toward you and kissing a girl who is leaning away from you.

Winston Churchill



Introduction

Owner of Bookkeeping Solutions

My start

Information overload

The questions

Goal - To design a framework to guide you to your version of success



FILTER out noise, FOCUS your effort

Challenge

What this session won't do..

It won't engage YOUR will



Phase 1: Personal core values

What are they?

- Characteristics, but bigger
- Define our success
- Transcends situations
- Our construction

Why bother to define them?

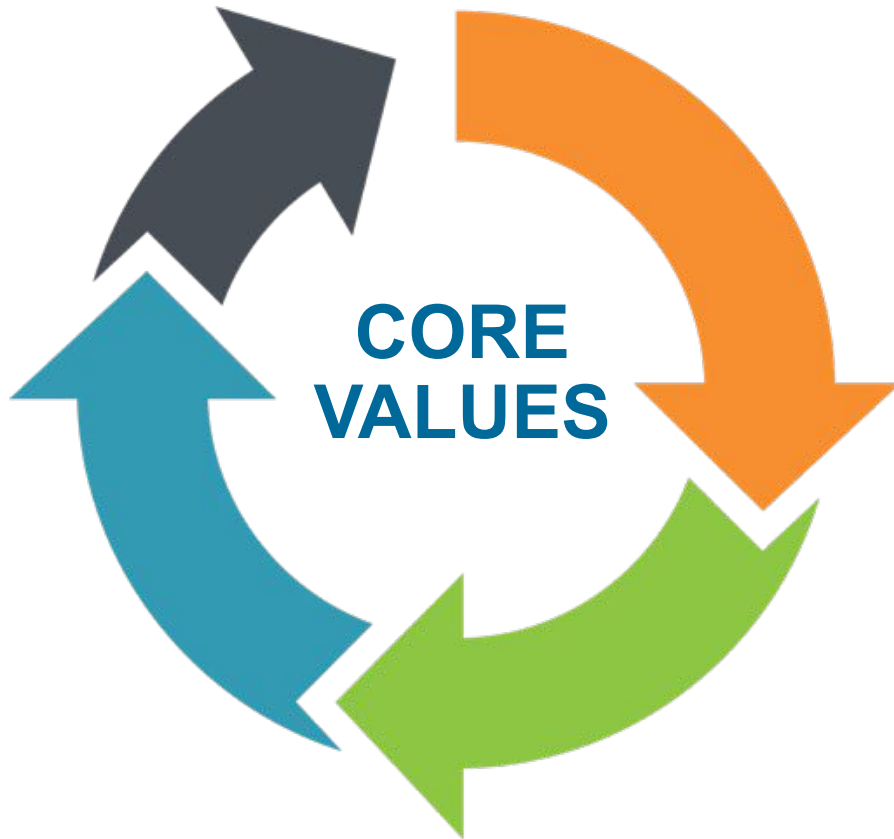
- See the target, celebrates the wins
- Simplifies life
- Work with yourself, not against



Phase 1: Personal core values

Let's get started

1. Write down goals
2. Where do you see yourself in 5 years?
3. Dig into the 'why' (at least 2 or 3 levels down)



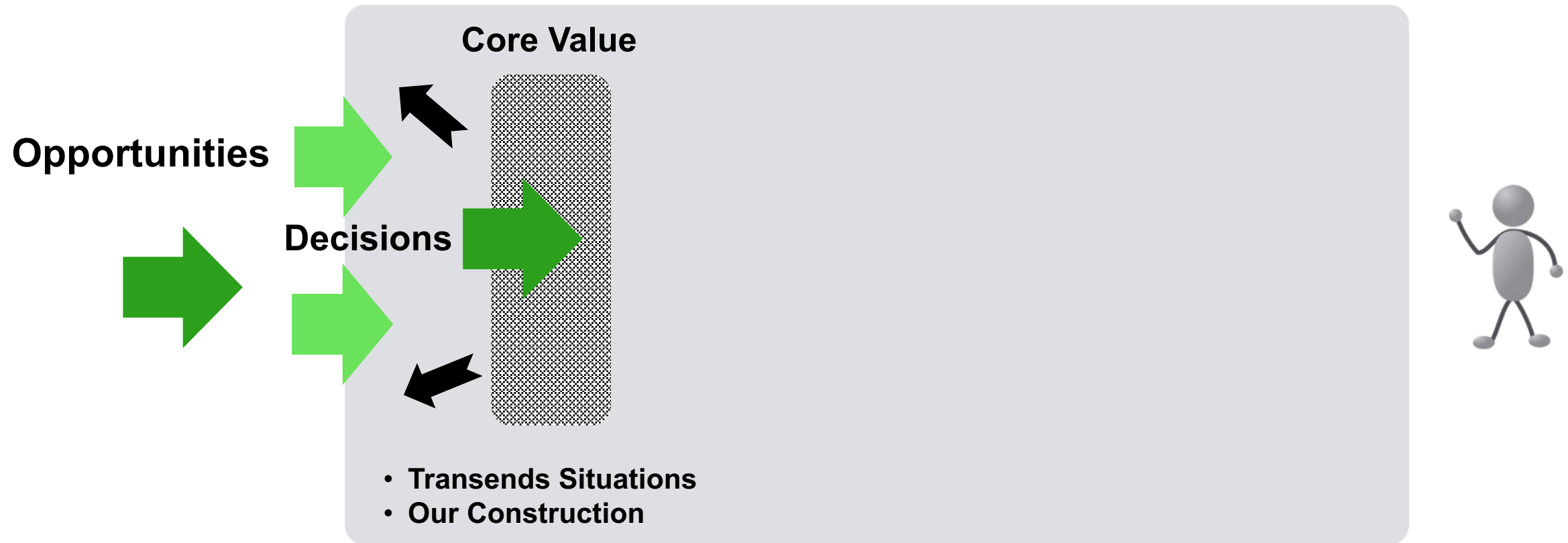
Core value example list

<https://scottjeffrey.com/core-values-list/>

This was a sample

Acceptance	Clever	Dedication	Exploration	Greatness	Intelligence	Originality	Security	Success
Accomplishment	Comfort	Dependability	Faith	Growth	Irreverent	Passion	Self-reliance	Support
Accountability	Commitment	Determination	Family	Happiness	Joy	Patience	Selfless	Surprise
Achievement	Communication	Development	Famous	Hard work	Justice	Peace	Sensitivity	Sustainability
Altruism	Community	Dignity	Fearless	Harmony	Kindness	Performance	Serenity	Talent
Ambition	Compassion	Discipline	Ferocious	Health	Knowledge	Persistence	Service	Teamwork
Assertiveness	Confidence	Discovery	Fidelity	Honesty	Leadership	Playfulness	Sharing	Thankful
Attentive	Connection	Drive	Focus	Honor	Learning	Potential	Significance	Traditional
Awareness	Contentment	Effectiveness	Fortitude	Hope	Liberty	Power	Silence	Tranquility
Balance	Contribution	Efficiency	Freedom	Humility	Logic	Present	Simplicity	Transparency
Beauty	Control	Empathy	Friendship	Imagination	Love	Productivity	Sincerity	Trust
Bravery	Conviction	Empower	Fun	Improvement	Loyalty	Professional	Skill	Truth
Brilliance	Courage	Energy	Generosity	Independent	Mastery	Prosperity	Solitude	Understanding
Capable	Creation	Enjoyment	Genius	Individuality	Meaning	Purpose	Spirit	Unity
Certainty	Creativity	Enthusiasm	Giving	Innovation	Moderation	Quality	Spirituality	Valor
Challenge	Curiosity	Ethical	Goodness	Inquisitive	Motivation	Responsibility	Spontaneous	Victory
Charity	Decisive	Excellence	Grace	Insightful	Openness	Restraint	Stability	Vision
		Experience	Gratitude	Inspiring	Optimism	Reverence	Status	Wealth
				Integrity	Order	Risk	Strength	Wisdom
					Organization	Satisfaction	Structure	Wonder

Framework (Phase 1 complete)



Phase 2: Realization of your values (Goals)

Make values tangible

- Goals are situational
- Zig Ziglar's – social, career, financial, spiritual, physical, intellectual, family
- The values are your why, the goals are your how

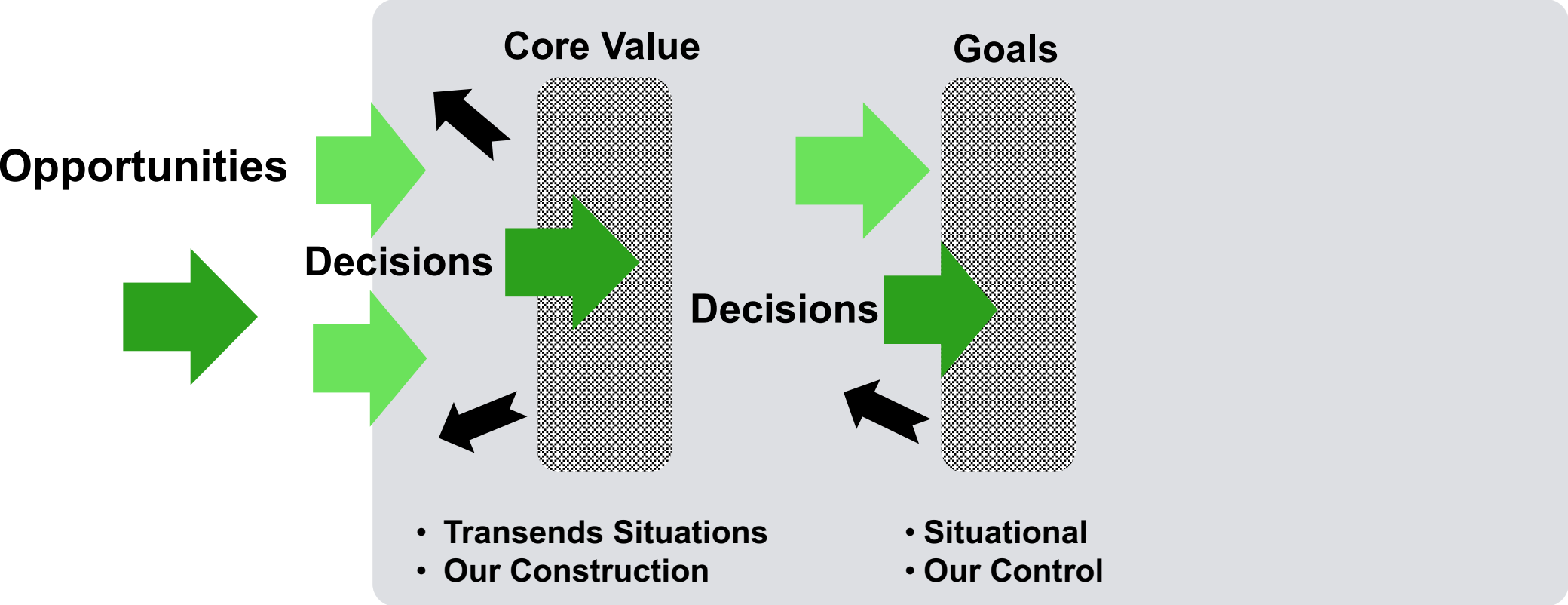


Values are your construction, Goals are in your control

Phase 2: Realization of your values (Goals)

1. What do you NEED to realize YOUR version of success?
2. Re read prior goals – cross out, tweak, enhance
3. Create new goals (situational)
 - In 5 years where do you want to be? In 10 years?
 - Ziggy's social, career, financial, spiritual, physical, intellectual, family
4. Read what you wrote, does it align with your values?

Framework (Phase 2 complete)



Phase 3: Tools & strategies to achieve

Impact of changes

Change is out of our control

It is your **CHOICE**

- You choose the tools, methods, and strategies for riding industry change



Phase 3: Tools & strategies to achieve



Power of industry shifts are limited

- They can't change your values
- They don't change your goals

You really do Own Your Future

Phase 3: Tools & strategies to achieve

What do you need to do in the next year to achieve your goals?

Tools

- QuickBooks Online, Apps, Project management software

Strategies

- Advisory services, Social Media advertising, Employees (hire/fire), Value pricing, Niche development



Phase 3: Tools & strategies to achieve

Prioritize

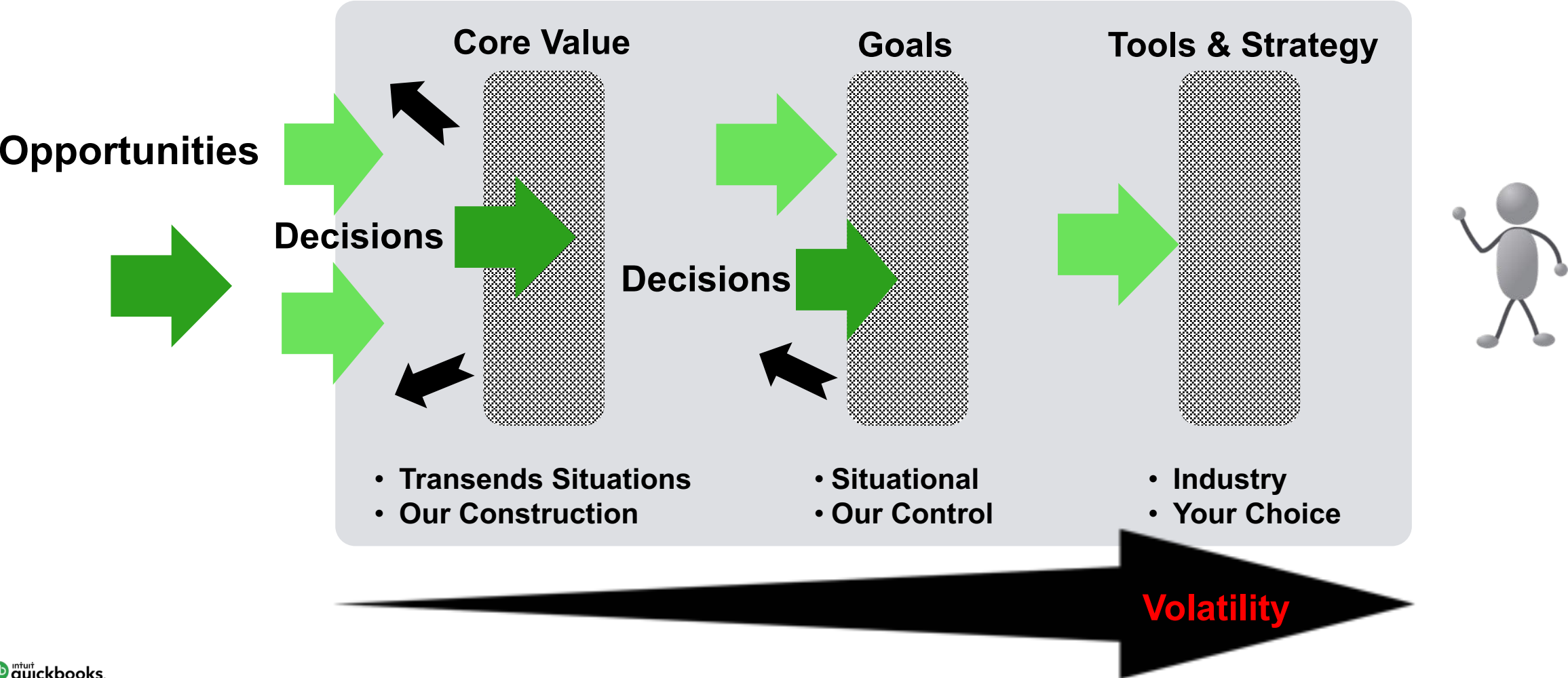
- Urgency – Needs attention now?
- Impact – Affects more than one goal?
- Ease – What can be done quickly?

Action Steps

- What can you do right now?



Framework



Next steps



1. What are your three core values?
2. Think on what goals are important to YOU
3. What are the tools & strategies you need to succeed?
 - What are your next two action steps ?

FILTER out noise, FOCUS your effort

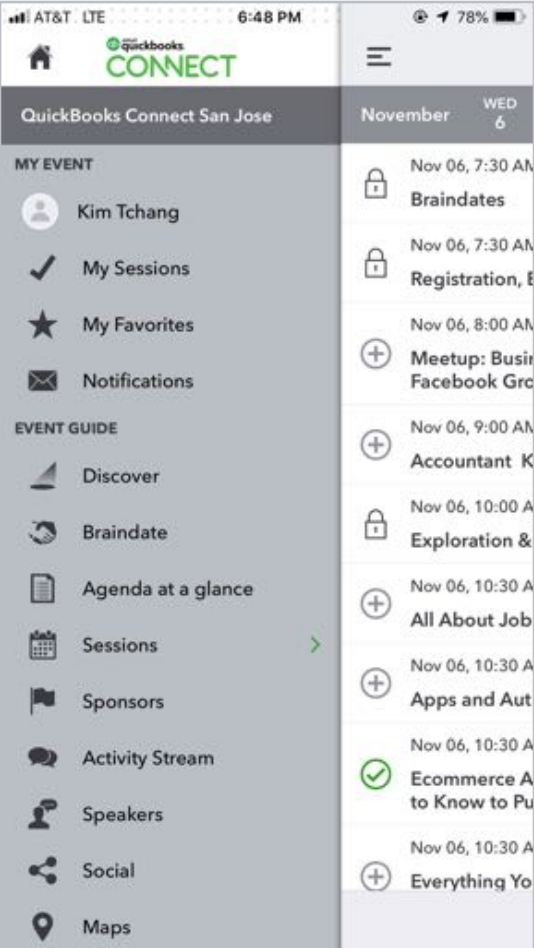


Questions?

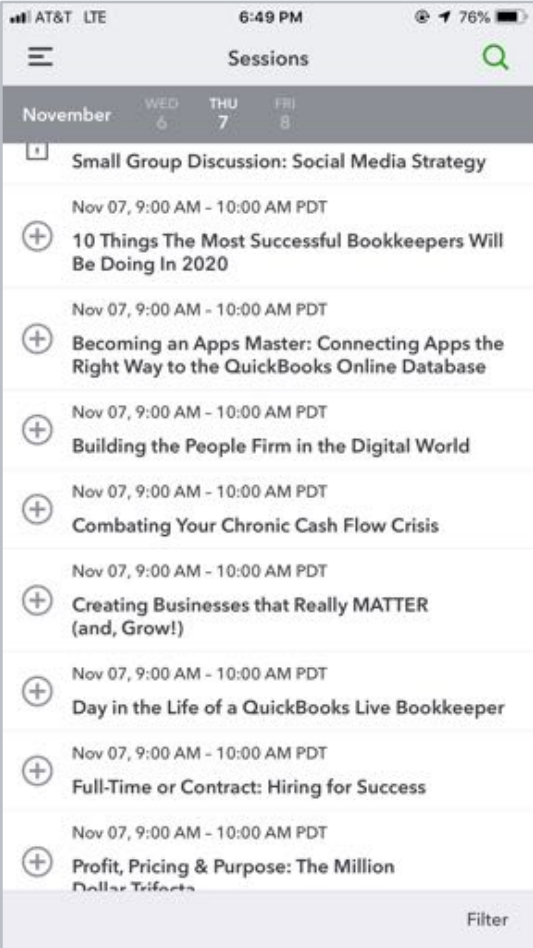
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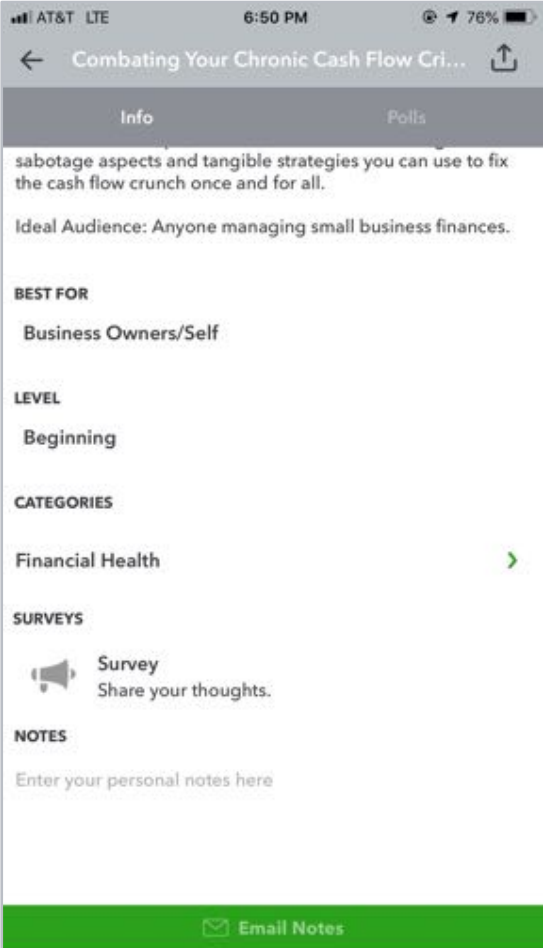
1. Select Sessions



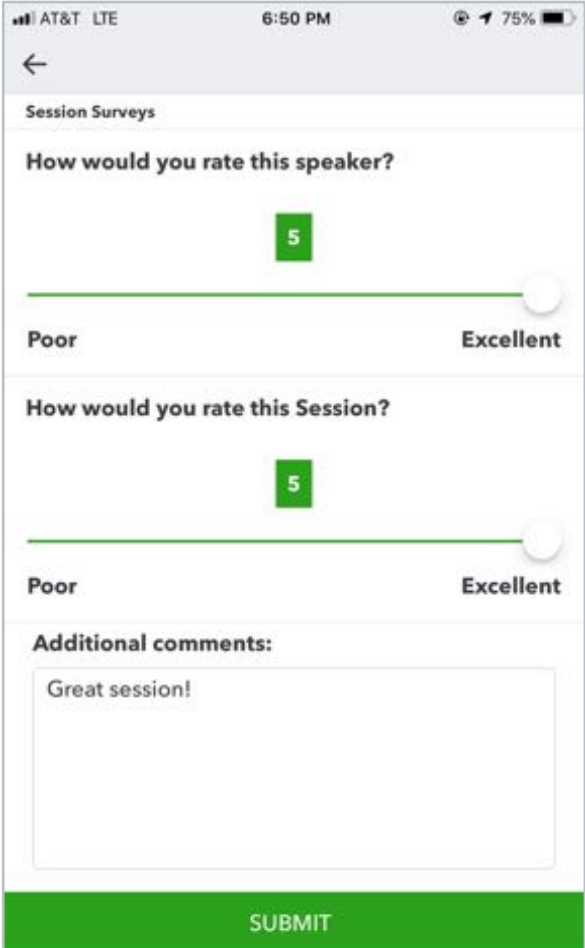
2. Select Session Title



3. Select Survey



3. 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://can.quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for December 10. The page has a green header with the QuickBooks logo and navigation links: Why Attend, Agenda (selected), Speakers, Pricing, Sponsors, Travel, and FAQ. Below the header, there are tabs for December 9 (Accountant Day), December 10 (selected), and December 11. A 'Print Agenda' link is in the top right. A paragraph describes breakout sessions. A search bar labeled 'Search for sessions' is present. Below it are filter buttons: Organizational Culture, Life & Business Skills, Technology Training, Business Growth, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list shows sessions from 7:30-9:00 am to 11:00 am-12:00 pm. The 'Breakout Sessions' section is expanded, showing details for 'Creating Your Small Business Culture', including a description, ideal audience, best for, speakers, location, track, CPD hours, and level. Other sessions listed are 'Understanding Personalities for Better Communication' and 'How to Use QuickBooks for Your Small Business: Introduction'.

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Why Attend Agenda Speakers Pricing Sponsors Travel FAQ

December 9
Accountant Day

December 10

December 11

Print Agenda

Attend breakout sessions to learn strategies to grow your business, how to hire and build an ideal culture, tips to improve your financial health and more. Connect with peers and experts for one-on-one learning. More information coming soon.

Search for sessions

Filters: Organizational Culture Life & Business Skills Technology Training Business Growth Advisory Financial Health Expand all +

7:30-9:00 am Registration, Breakfast & Exploration +

8:00-8:45 am Meetup: New to Networking +

9:00-10:00 am Morning Keynote +

10:00-11:00 am Exploration & Connection +

10:15-11:00 am Meetup: Women in the Workforce +

11:00 am-12:00 pm

Breakout Sessions

Creating Your Small Business Culture

Many solopreneurs and small business owners feel like they don't have time to work on their company culture (or that they even should). Instead, they spend most of their days working in their business rather than "on" their business. In this session, you will receive tips on how to reduce stress, improve productivity, and improve your personal fulfillment all through the nurturing of your crew, your clients, your fans, AND yourself!

Ideal Audience: Business owners looking to enhance their culture.

Best For: Business Owners/Self-Employed

Speakers: Tamia Madenitz

Location: Room 201 CDEF

Track: Organizational Culture

CPD Hours: 1

Level: Introduction

Understanding Personalities for Better Communication +

How to Use QuickBooks for Your Small Business: Introduction +



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THE
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