Bookkeepers:
A practical application lab

Lisa Channell Wanless
Melanie Schroeder

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Today's speaker

Lisa Channell Wanless

Bonfire Bookkeeping

@bonfire_books

Today's speaker

Melanie Schroeder

Chartered Professional Accountant

@likeitwasmine

Agenda

Introduction

Standard Operating Procedures

Boundaries

Client Profitability Check

Proposals

Agenda call out option

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"

One of the marvelous things about community is that it enables us to welcome and help people in a way we couldn't as individuals."

Jean Vanier

Agenda call out option

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" "

Over the course of many encounters and many years, I have successfully developed a standard operating procedure for dealing with big, nasty monsters. Run away.

Jim Butcher

Session goals

- Understand the power of Standard Operating Procedures

- Define the areas of our business we can use them in

- Create a library shared SOP's

LEAVE THE SESSION WITH ACCESS TO A LIBRARY OF STANDARD OPERATING PROCEDURE TEMPLATES

What's in a name?

- Why should we care about Standard Operating Procedures?

LEAVE THE SESSION WITH ACCESS TO A LIBRARY OF STANDARD OPERATING PROCEDURE TEMPLATES

Get organized

- Brainstorm

LEAVE THE SESSION WITH ACCESS TO A LIBRARY OF STANDARD OPERATING PROCEDURE TEMPLATES

Lab work

- Assign Standard Operating Procedures to Groups

- Find standard format template in Google Drive for your group

- Follow the instructions in the template!

LEAVE THE SESSION WITH ACCESS TO A LIBRARY OF STANDARD OPERATING PROCEDURE TEMPLATES

Questions?

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Compassionate people ask for what they need. They say no when they need to, and when they say yes, they mean it. They're compassionate because their boundaries keep them out of resentment."
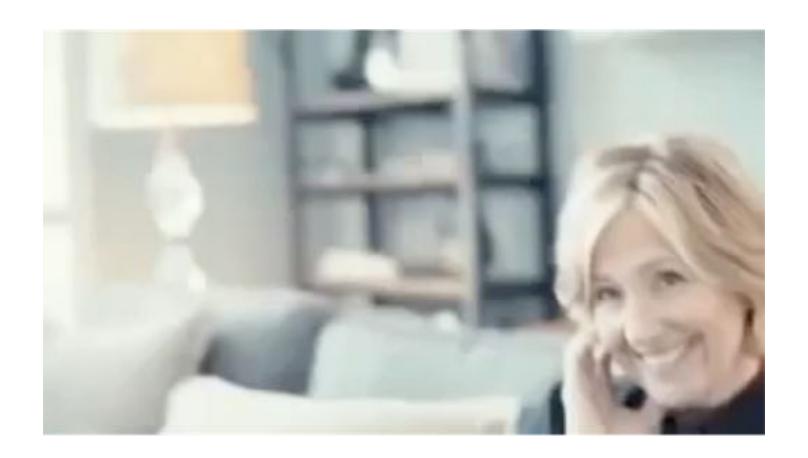
Brené Brown, Rising Strong

Session goals

- Define the word boundaries

- Get clarity on some of your own boundaries

- Discover key areas for boundaries in your business

- Learn some tools for communicating your boundaries

GET CLEAR ON WHAT'S OK AND WHAT'S NOT OK

Brené Brown on boundaries

Communications

- How would you let clients know the best way to get in touch with you?

- When do you find is the best time to do this?

- What's the best way to tell someone they've overstepped a boundary?

GET CLEAR ON WHAT'S OK AND WHAT'S NOT OK

Time blocking

- What time of day do you do your best work?

- When do you absolutely hate meeting clients?

- How do you identify your must do's vs your guilty should do's

- When are you NOT available? How many meetings is too many?

- How many hours a day/week/month/year do you want to work.

GET CLEAR ON WHAT'S OK AND WHAT'S NOT OK

Engagement letters

- What are you giving up to be available for your clients?

- How available do you want to be for your clients?

- What goes into a good engagement letter?

- Do you do more than what is in your engagement?

- How do you feel about charging for work that is out of scope in your engagement letter?

GET CLEAR ON WHAT'S OK AND WHAT'S NOT OK

Lab work

- Pick one of the boundary areas we covered to work on

- Find the folder in the Google Drive

- Open and follow the instructions document

GET CLEAR ON WHAT'S OK AND WHAT'S NOT OK

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Moneymaking is not a serious business; it's a game. At first it may seem that it's a game that you play with forces outside yourself – the economies of the marketplace, so to speak. But as you proceed, you discover that it's actually a game you play with yourself!"

Stuart Wilde

Session goals

- Create a spreadsheet to review profitability on a project basis

- Get a quick idea of whether your projects are profitable

- Have an easy rule of thumb "rate" to create quotes

WHAT YOU MEASURE YOU CAN CHANGE

Define your variables

- What is your annual revenue goal?

- How many hours a year do you have available for client work?

- Divide ARG/AH

WHAT YOU MEASURE YOU CAN CHANGE

Lab work

- Open profit analyzer spreadsheet

- Complete with at least a few sample bookkeeping projects

- Discuss with your group:
  - Are your projects profitable?
  - Were the results what you expected?
  - How do you feel about the information?

WHAT YOU MEASURE YOU CAN CHANGE

Questions?

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Proposals

Session goals

- Know which proposal type they want

- Introduce different proposals

- Library of proposals/wording

- How to make your proposal compelling/unique

- Not covering how to price

LEAVE WITH A LIBRARY OF PROPOSAL WORDING AND TEMPLATES

Proposal deep dive

- The good, the bad, the ugly

LEAVE WITH A LIBRARY OF PROPOSAL WORDING AND TEMPLATES

Proposal nuts and bolts

- How

- What

- Who

LEAVE WITH A LIBRARY OF PROPOSAL WORDING AND TEMPLATES

Lab work

- Create a proposal template

- Brainstorm beyond compliance – enter into Google document

- Discuss with your group:

  - What is your unique gift?

  - What is one piece of feedback you get consistently from your clients? How can you include this in your proposals?

  - What do you normally over/under estimate in your proposals?

LEAVE WITH A LIBRARY OF PROPOSAL WORDING AND TEMPLATES

Questions?

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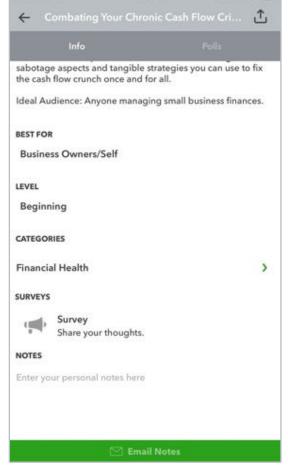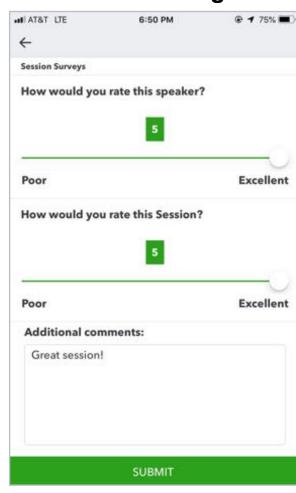Provide feedback to help us design content for future events

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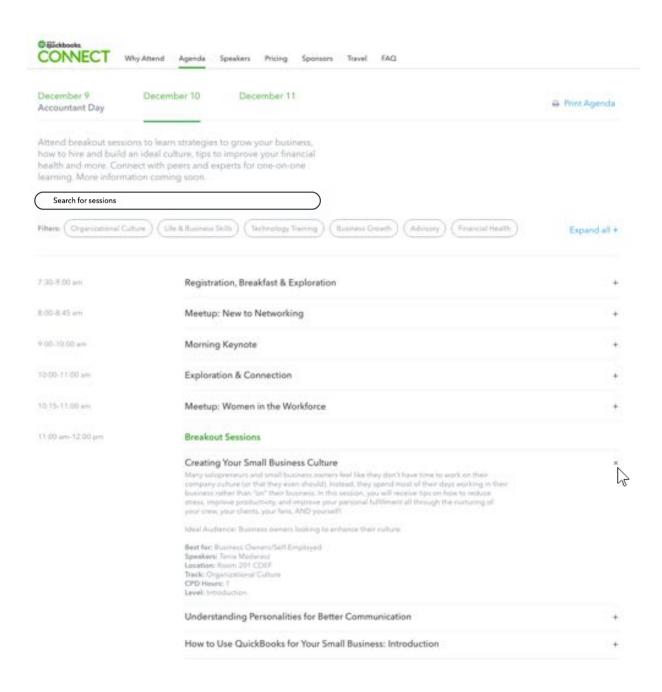
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