

The “Backseat Driver” Client

Guiding Your Clients to Respect Your Process, Systems & Timetables

WOODARDTM

During this Training Event You Will...

1. Discover practical ways to standardize your entire practice around a single set of technology and process.
2. Learn methods to get clients to adopt your practice's systems and processes.
3. Develop strategies for clients to get you the information you need...on time!



Beginning with the End in Mind: The Meta-Topic



Intentional



Specialized



Efficient



Profitable



Scalable



Effective

Pathway to Practice Transformation

Your Practice Goals

- Intentionality
- Specialization
- Efficiency/Automation
- Profitability/Strategic Pricing
- Scalability
- Effectiveness

Essential Components for Advancement

- Skills and Knowledge
- Systems and Processes
- Tools and Solutions
- Peer Collaboration/Accountability
- Certifications

A Transformed Practice

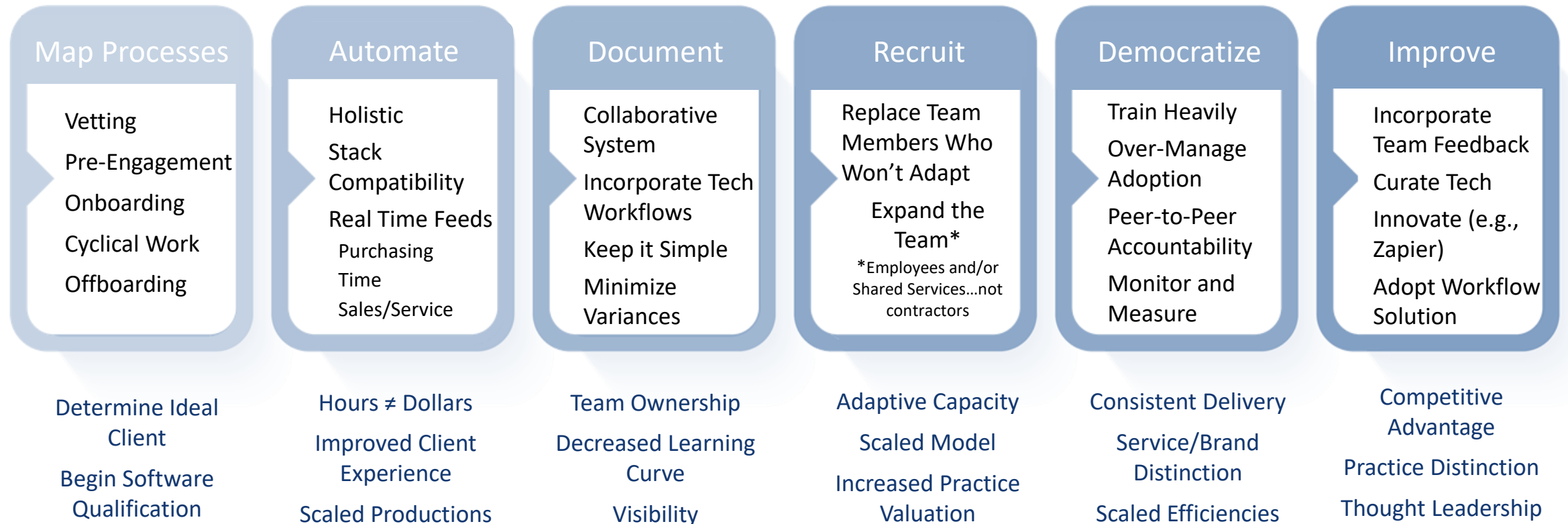
Segment 1

Pathways to Practice Standardization

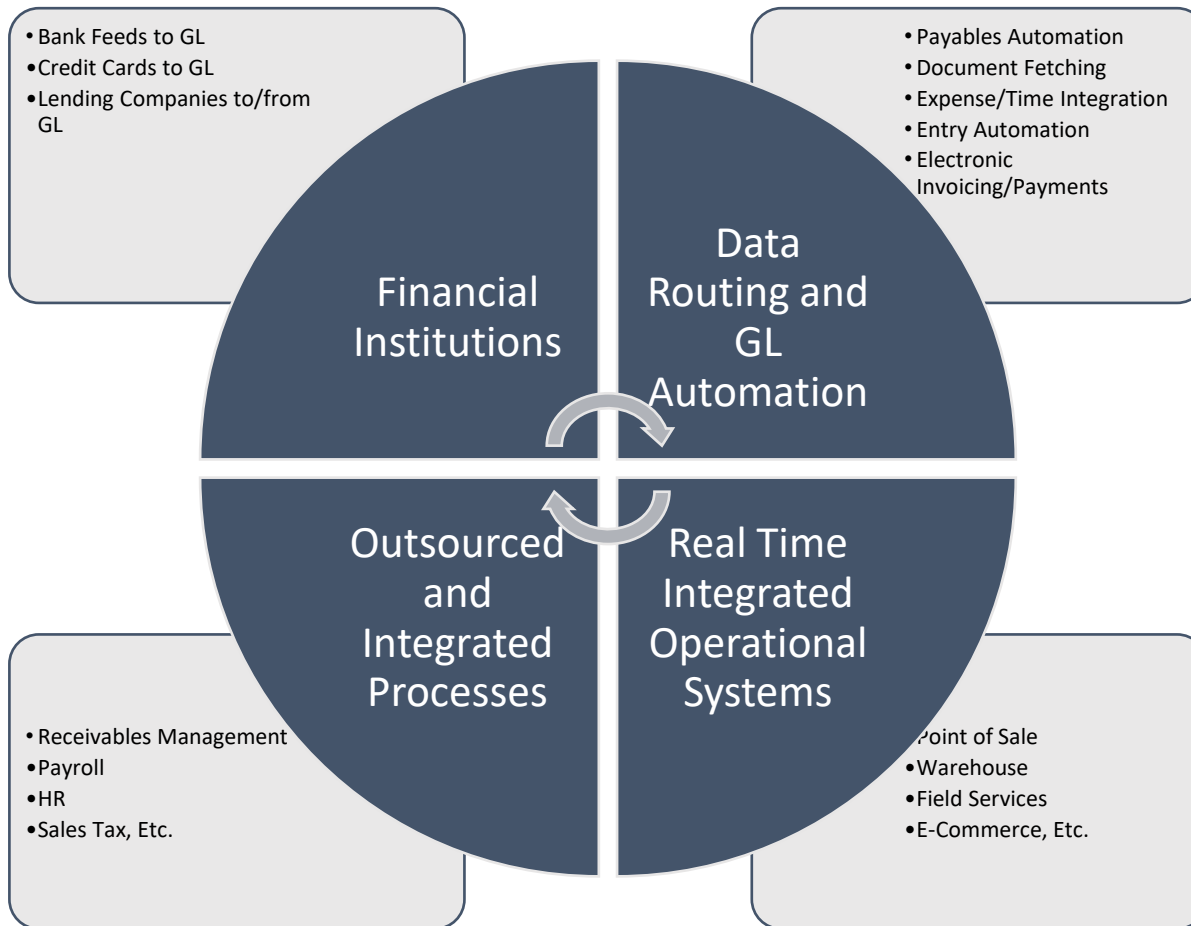


Up Next: Methods to get clients to adopt your practice's systems and processes

Pathway to Practice-Wide Standardization



Comprehensive Bookkeeping Automation



Prioritizing Automation

1. Standardize around a single payroll solution
2. Maximize bank feeds
3. Deploy payables automation
4. Deploy entry automation
5. Integrate the GL with operational systems*
6. Standardize around a single sales tax solution
7. Fold in integrated HR

*Tip: Use Transaction Pro for systems that do not integrate with QuickBooks.

Segment 2

Methods to Get Clients to
Adopt Your Systems and
Processes



Up Next: Strategies for clients to get you the information you need...on time

Strategies for Client Adoption

- Brand Around Expertise
 - Manage the Way Your Client's Perceive You
 - You are the expert in the room
 - You are their leader/mentor on all matters related to the back office
 - Manage the Way You See Yourself
 - You are not a “contractor,” and you are not an employee
 - You are not “just” a bookkeeper. You are a “super/modern/cutting edge” bookkeeper
- Connect Your Process to Their Pain – Responsive
 - Outdated Systems
 - Lack of Integration/Connection of Data Sources
 - Inaccessibility of Actionable Information, etc.



Strategies for Client Adoption

- Connect Your Process to Increased Value – Proactive
 - Security
 - Accessibility – Including Mobile
 - Timeliness of Actionable Information, etc.
- Include Your Process and Technology in Your Formal Client Agreements as Exhibits to Your Master Services Agreement
 - Upcharges for variant or outdated software
 - Pre-authorized upgrades for desktop applications
- Build Variations of Process into Your Pricing Model...**and Change Orders!**
- Be Willing to Walk Away



Segment 3

Strategies for clients to get
you the information you
need...on time



Strategies for Client Collaboration and Timeliness

- Go Mobile
 - Use a Product Like Liscio or ClientHub
 - Use a Portal Solution that Supports Mobile Interaction like Canopy
- Set Reminders with Multiple Layers of Reinforcement
 - Use an SMS Solution like Podium
 - Use an Automated, Date-Driven Communication Solution like HubSpot or MailChimp
- Engage the Client Using a Subscription Model
 - Include monthly meetings for collaboration
 - Include monthly meetings for review and analysis
- Integrate Client Communications into Your Workflow Solution (e.g., Canopy or Karbon)
- Include Deadlines in Statements of Work with Passively Exercised Options



A Hypothetical Delay of Engagement Framework

[Client Company Name] has the **option** to delay or suspend the timeline for services we conduct as part of this Agreement. The exercise of this option is at a flat rate paid to [Your Company Name] of \$x,xxx. [Client Company Name] exercises this option for delay of engagement by missing deadlines stated in Statements of Work that are governed by this Agreement. This \$x,xxx option is over and above any amounts due to [Your Company Name] for services performed and the delay or suspension of timeline has no impact on the compensation due by [Client Company Name] to [Your Company Name] for product or services provided by [Your Company Name] to [Client Company Name] as part of this Agreement.

Note: The above wording is provided as an educational benefit only, to communicate the *concept* of a delay of engagement option. The above does not constitute legal advice or suggested phrasing for legal documentation and should not be used by you in any way in the management of your practice. We strongly recommend seeking legal counsel when creating legal documents of any kind in your business.

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