

Displaced



Keeping Clients Who
Outgrow Your Services

WOODARDTM

During this Training Event You Will...

- Explore specific "para-bookkeeping" services and consulting services you can offer clients who manage their own bookkeeping.
- Learn how to leverage strategic partnerships with selected software developers to expand your slate of consulting services.
- Receive my "Top 5 Tips" for pricing and selling support and consulting services.



CPE

- This event qualifies for one hour of CPE
- The field of study is Business Management & Organization
- You will receive your CPE certificate within one-week of the live event
- Your certificate will contain the first and last name you used to register for today's webinar
- We will deliver the certificate to the email address you used to register for today's webinar
- You must respond to all three polling questions to qualify for CPE



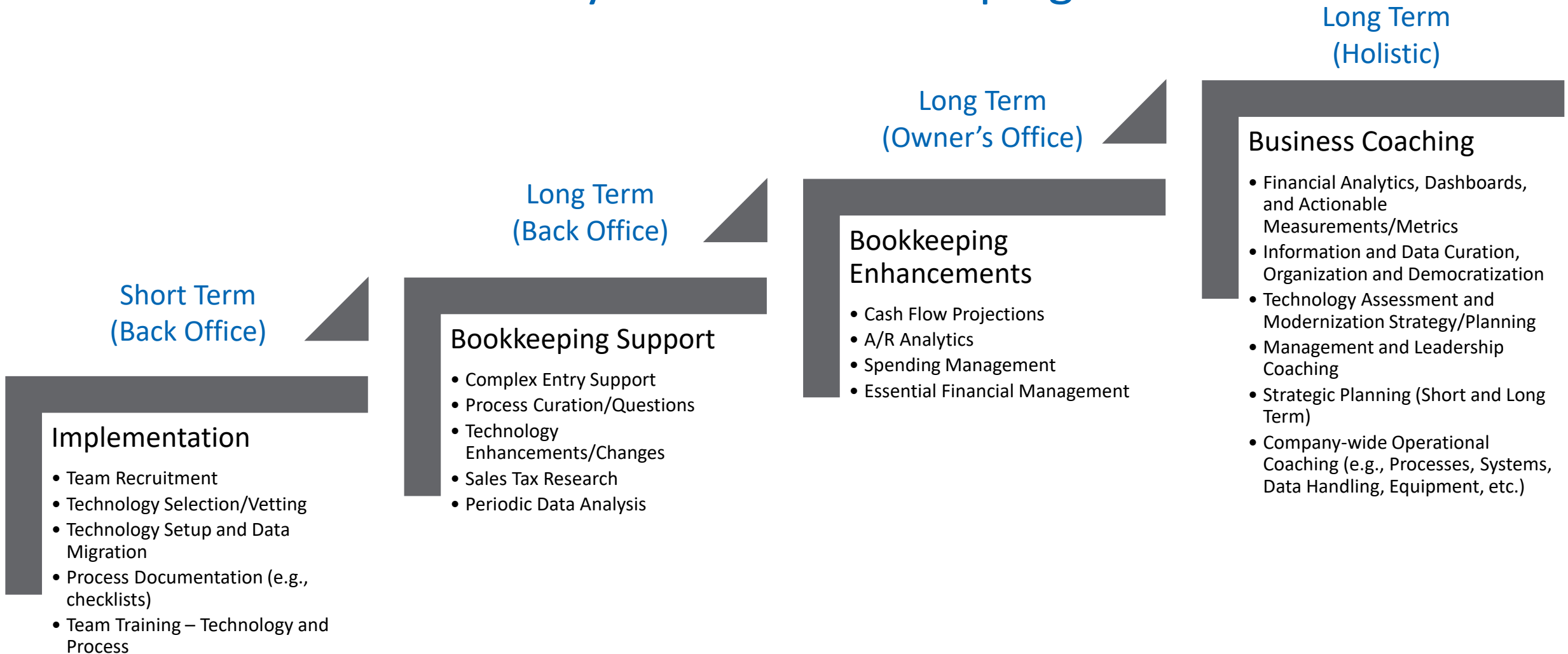
Note: You Can Evaluate this Webinar Using an Online Evaluation Form. You Can Access this Form When You Leave the Webinar

Section 1

“Para-bookkeeping” services and consulting services you can offer clients who manage their own bookkeeping.



Four Levels of Services Beyond the Bookkeeping

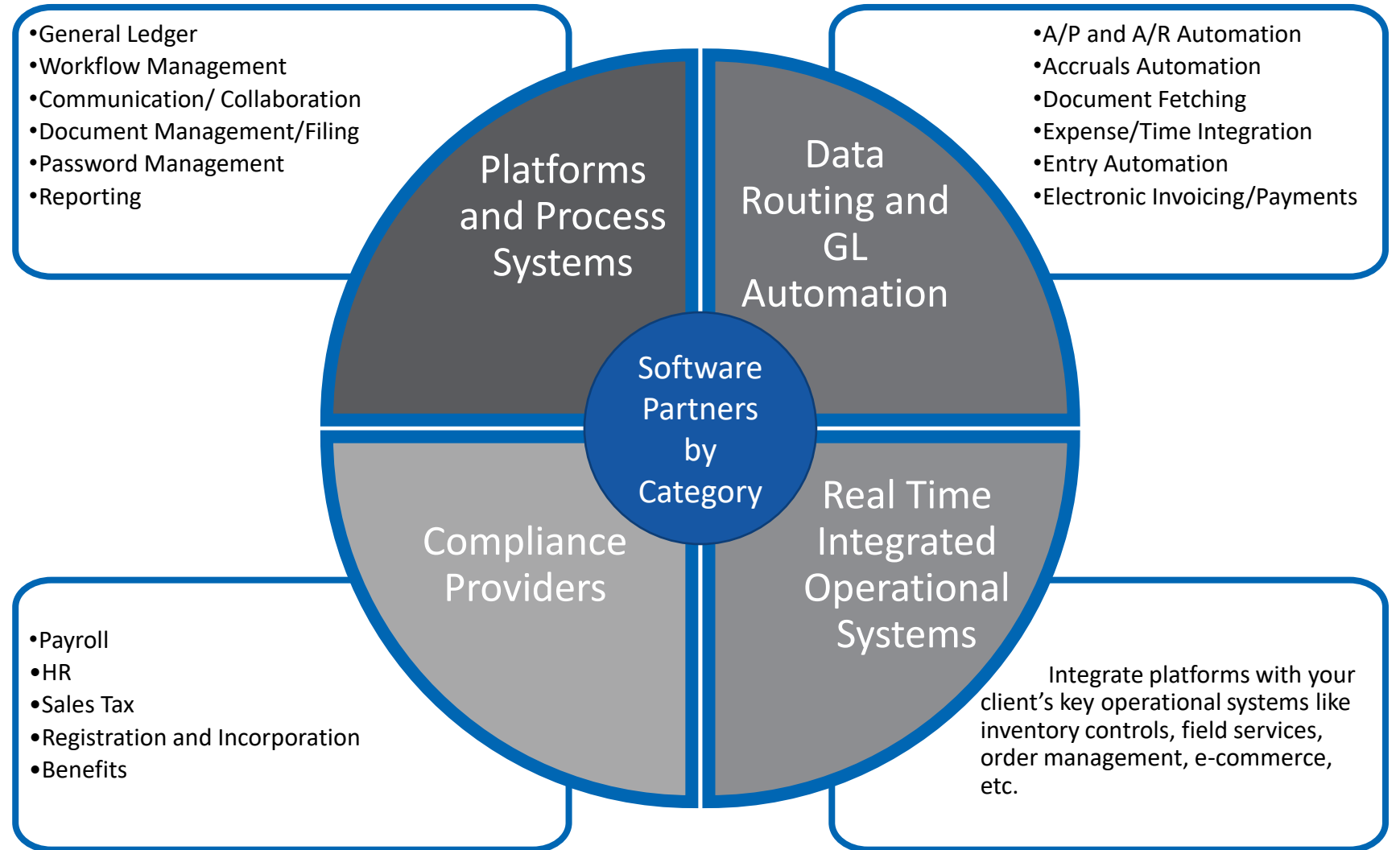


Section 2

Strategic partnerships with software developers that expand your slate of consulting services.



Strategic Partnerships with Software Developers (by Category)



Free Resource

“Approvals on the Go: How Automation Improves the Accounts Payable Process”

Includes 10 Specific Ways to Improve Your Client’s Current Process!



Back-office Consulting through Developer Partnerships

- Accounts Payable Entry Automation
 - Extreme Customization/Rules
 - Line-Item Level Entry Automation
- Electronic Purchase Order Management and Approvals
- Digital/Mobile Bill Payment Approvals
- Electronic Bill Payment Processing
- Fraud Reduction
- Industry-Specific Features for Banking, Associations, Construction, Healthcare, Hospitality and Real Estate
- Integration with a Wide Range of Platforms



Section 3

"Top 5 Tips" for pricing and selling support and consulting services.

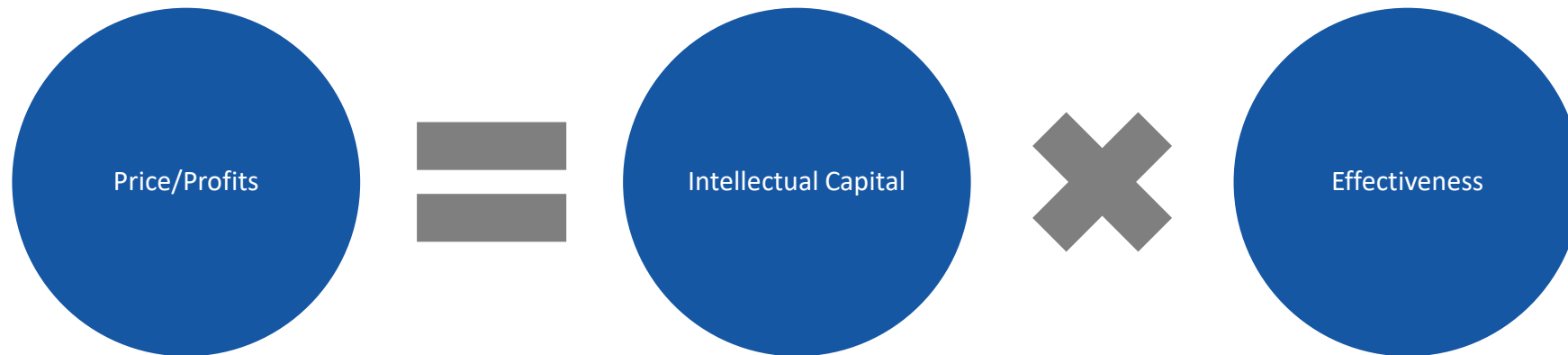


Top 5 Tips for Pricing and Selling Consulting Services

Tip Number 1:
Focus on Their Pain



Top 5 Tips for Pricing and Selling Consulting Services



Top 5 Tips for Pricing and Selling Consulting Services

There Are Only Two Wealth Generators

How You Make Me Feel (Emotional)

	Therapists
	Entertainers
	Recreation Providers
	Illegal Drugs
	Etc.

How You Solve My Problem

	Therapists
	Professionals
	Service Workers
	Executioners
	Etc.

Top 5 Tips for Pricing and Selling Consulting Services

Tip Number 2:
Engage Incrementally



Top 5 Tips for Pricing and Selling Consulting Services

- **Phase 1: Assessment and Planning**
 - Sub-Phase 1: Needs Assessment for Brining the Back Office In House
 - Sub-Phase 2: Project Plan for Back Office Implementation
- **Phase 2: Project Management**
 - Team Recruitment
 - Technology Selection/Vetting
 - Technology Setup and Data Migration
 - Process Documentation (e.g., checklists)
 - Team Training – Technology and Process

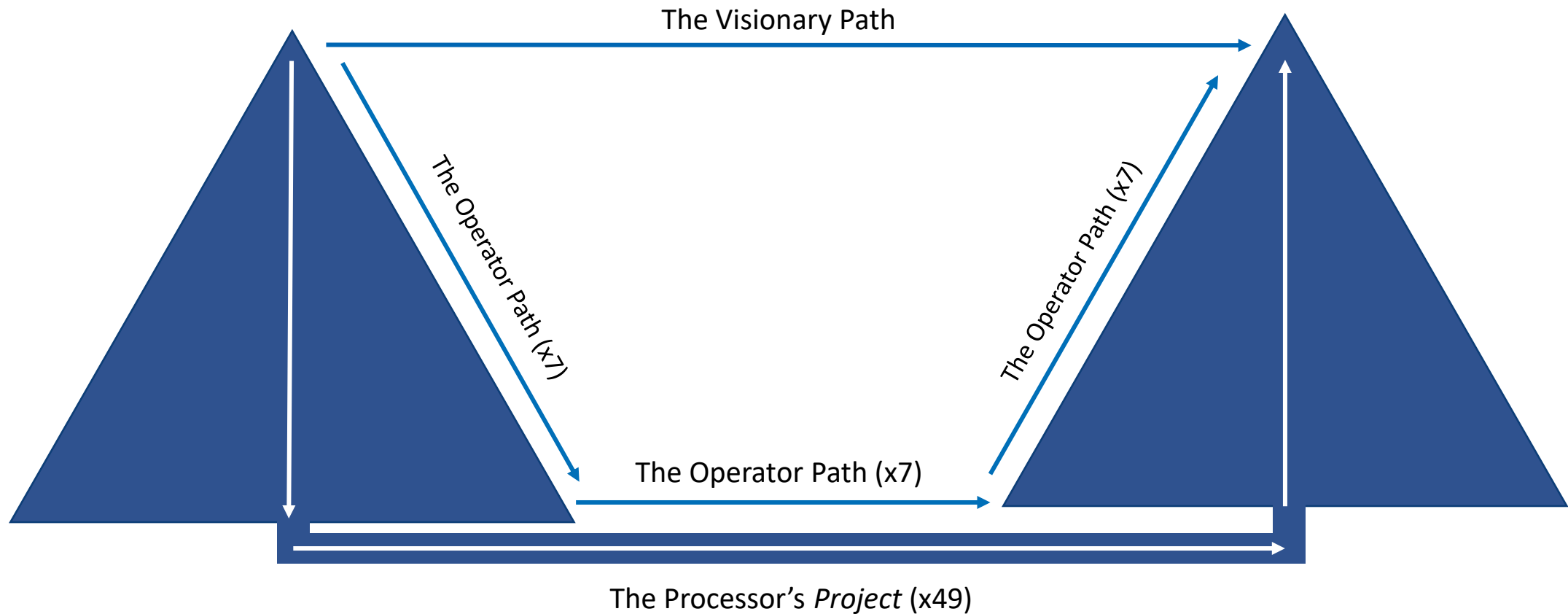
Top 5 Tips for Pricing and Selling Consulting Services

Tip Number 3:

Never Engage for a Period of
Less than One Year...Even with
Implementation



Top 5 Tips for Pricing and Selling Consulting Services



Top 5 Tips for Pricing and Selling Consulting Services

Tip Number 4:

Tightly Manage the Scope and Timetables of the Project



Top 5 Tips for Pricing and Selling Consulting Services

Tip Number 5:

Regularly Reinforce the Value:
Connect Your Outcomes to How You
Solved the Problem and Increased
their Wealth



Displaced



Keeping Clients Who
Outgrow Your Services

WOODARDTM