I Can’t See!

Identifying and Removing Critical Blind Spots in Your Practice
During this Training Event You Will Learn...

10 Pain Points Accountants and Bookkeepers Face with the Day In, Day out Interactions with Their Clients...

1. Lack of access to critical information and documents
2. Slow turnaround times on client signatures and authorizations
3. Tracking productions – by dollar values – between billing cycles
4. Slow paying clients
5. Inability to measure productivity or profitability by team member
6. Inability to measure productivity or profitability by client
7. Management, retention, and searchability of client documents
8. Project and task status – especially for projects that are long term and/or involve multiple professionals
9. Measuring and forecasting team capacity
10. Managing remote workers
# Learning Objectives by Time Horizon

**Rear View Mirror (Past)**
- Slow paying clients
- Inability to measure productivity or profitability by team member
- Inability to measure productivity or profitability by client

**Windshield (Present)**
- Lack of access to critical information and documents
- Slow turnaround times on client signatures and authorizations
- Tracking productions – by dollar values – between billing cycles
- Management, retention, and searchability of client documents
- Project and task status
- Managing remote workers

**GPS (Future)**
- Measuring and forecasting team capacity
About Our Guest Presenter

• 34-year practicing CPA
• World class software developer
• Tim has run his firm, Sines and Associates, since 1988 and simultaneously developed three different Practice Management Platforms
• B.A. in Accounting – Maryland School of Business
• National trainer of accounting firms on practice management related topics – including breakouts at Scaling New Heights 2022!

Note: This event is a podcast-style, audio-only conversation between Joe Woodard and Tim Sines, CPA addressing 10 key “blind spots” with managing a accounting or bookkeeping practice.
Critical Visibility Part 1

The Rear View Mirror
(Measurements of the Past)

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The Rear View Mirror: Measurements of the Past

Client Receivable
Turns and Payment Processes

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The Rear View Mirror: Measurements of the Past

Productivity and Profitability by Team Member

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The Rear View Mirror: Measurements of the Past

Productivity/Profitability by Client

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Critical Visibility Part 2

The Windshield
Operational (Present) Processes and Measurements

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The Windshield: Operational Measurements & Processes

Access to Critical Information and Documentation

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The Windshield: Operational Measurements & Processes

Client Signatures and Authorizations

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The Windshield: Operational Measurements & Processes

Measurements for Engagements in Process (WIP)

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The Windshield: Operational Measurements & Processes

Client Document Management

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The Windshield: Operational Measurements & Processes

Project and Task Statuses and Reporting

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The Windshield: Operational Measurements & Processes

Managing Remote Workers

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About Woodard’s Coaching Program

Practice Advancement

Courses
- The Ideal Practice
- Maximizing Personal and Team Productivity
- Amplifying Your Practice
- Strategic Pricing
- Data and Security Policies and Procedures
- Maximizing Microsoft 365 in Your Practice

Execution Workshops – Building an Ideal Practice
- Ideal You (i.e., Brand)
- Ideal Services
- Ideal Client Base
- Ideal Technology
- Ideal Process
- Ideal Engagement
- Ideal Team

Client Coaching

Client Coaching Courses
- Management Coaching
- Financial Coaching
- Technology and Systems Coaching
- Operational Coaching
- Succession Preparation Coaching
- Knowledge Management Coaching

“Bookkeeping Plus” Courses
- Financial Measurements: Essentials
- Accounts Receivable Management
- Cash Flow Management: Essentials
- Spend Management
Critical Visibility Part 3

The GPS
Projections/Forecasts

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The GPS: One Key Forward-Looking Measurement

Measuring and Forecasting Team Capacity

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