

The Bionic Bookkeeper

Harmonizing Machines and People
in Your Practice



During this Training Event You Will...

1. Explore reasons why your practice should manage your client's bookkeeping technologies...and how to build a practice of clients who respect this!
2. Learn ways to lead your team members and your clients through the technology adoption process.
3. Discover the powerful return on investment for your practice *and* your clients in modernizing your bookkeeping production
4. Receive Joe Woodard's roadmap for building a modernized and automated bookkeeping/CAS practice.



Beginning with the End in Mind: Beyond “Bionics”



Intentional



Specialized



Efficient



Profitable



Scalable



Effective

Pathway to Practice Transformation

Your Practice Goals

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

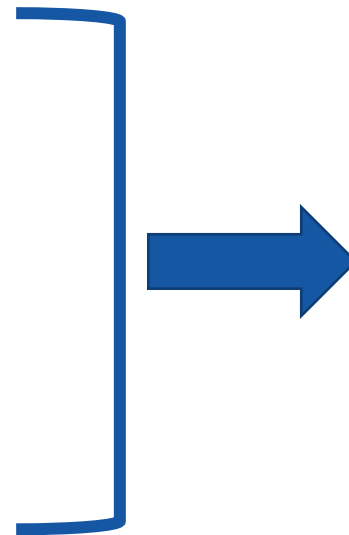
Essential Components for Advancement

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

A Transformed Practice

One Day Workshops

10-Week Courses



Skills and Knowledge

Systems and Processes

Tools and Solutions

Peer Collaboration/Accountability

Certifications

Segment 1: Panel Conversation

- Explore reasons why your practice should manage your client's bookkeeping technologies...and how to build a practice of clients who respect this!
- Learn ways to lead your team members and your clients through the technology adoption process.
- Discover the powerful return on investment for your practice and your clients in modernizing your bookkeeping production



Up Next: Receive Joe Woodard's roadmap for building a modernized and automated bookkeeping/CAS practice.

Panel Conversation



Deb Defer
Managing Director, Business
Services and Outsourcing



Lance Conrad
Director of Business
Development



Jan Haugo
General Manager



Ask questions of our panelists using the Questions pane of your GotoWebinar panel.

Note: This segment of the webinar is audio only.

Segment 2: Presentation

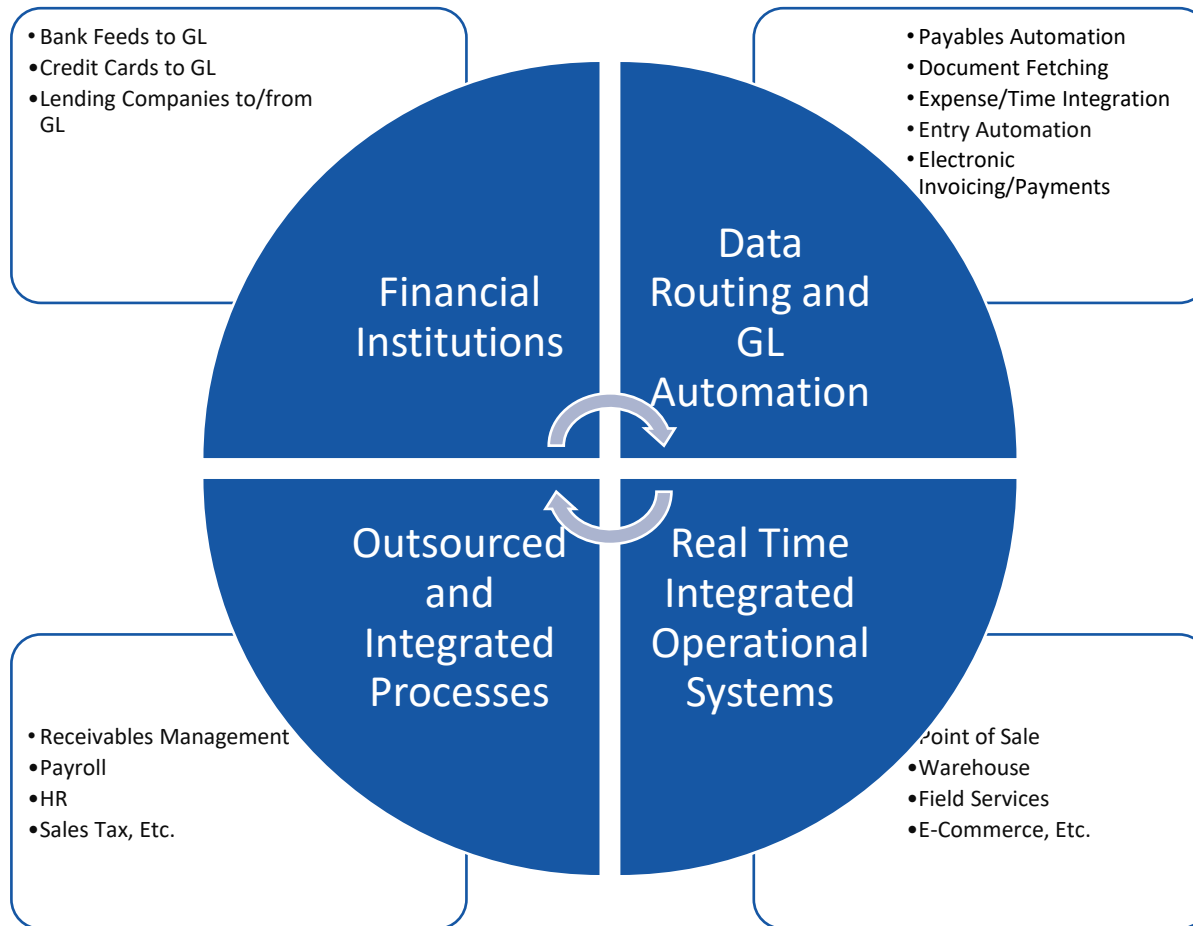
Joe Woodard's roadmap for building a modernized and automated bookkeeping/CAS practice.



Pathway to Modernization and Automation



Comprehensive Bookkeeping Automation



Prioritizing Automation

1. Maximize bank feeds
2. Deploy payables automation
3. Deploy entry automation
4. Integrate the GL with operational systems*
5. Standardize around a single integrated payroll solution
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.

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