


WHAT IS YOUR VALUE?



Doug Sleeter



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THE DISRUPTION IS HERE

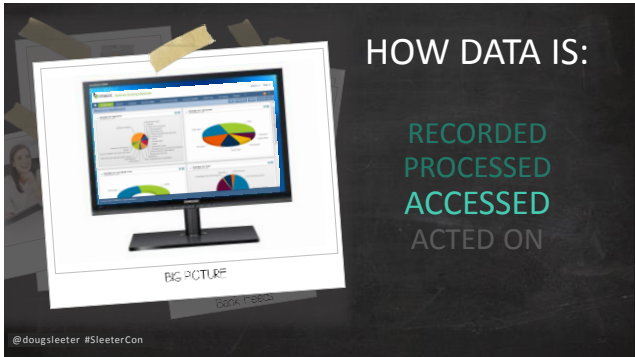
- “Chunkification”
- Zero Data Entry
- Collaborative Services
- Mobile Access

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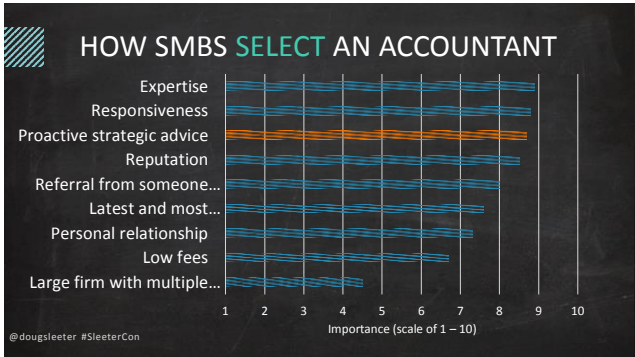


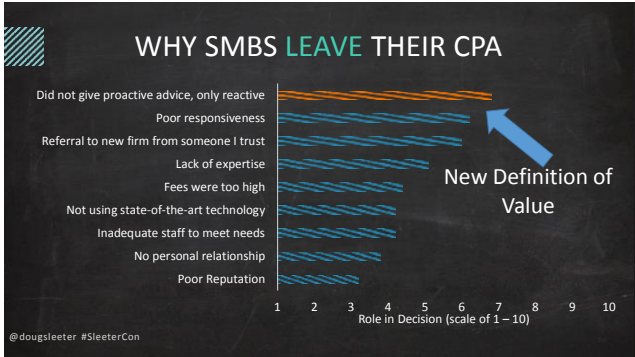














Famous Quotes

Current practice models are **"Episodic & Passive, Transactional Services."**
 — Tom Hood, CPA.CITP




"Accountants occasionally perform 'Random Acts of Consulting,' ... But the prevailing, obsolete business models focus on compliance."
 — Edi Osborne, Mentor Plus



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FUNDAMENTAL ASSUMPTIONS



- Business Model
- Technology Model
- People and Staffing Model
- Processes

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OBSOLETE ASSUMPTIONS

Bookkeeping	Client Entered	
	Using Desktop Software	
Information	Paper Based	
Communication	Mostly in Person	
Primary Revenue Source	Compliance	

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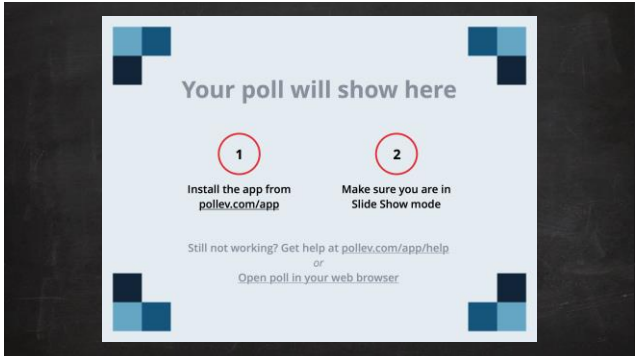
VIABILITY = VALUE

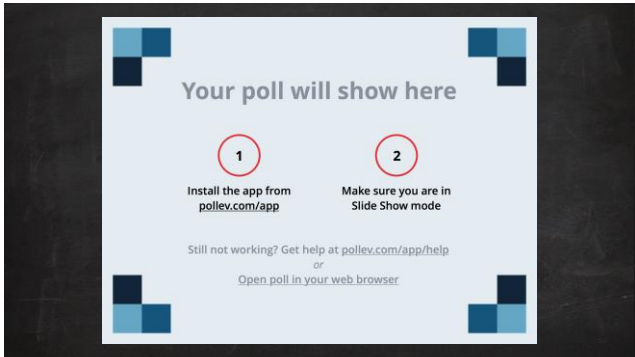
- How viable is your practice today?
- Five years from today?
- Ten years from today?

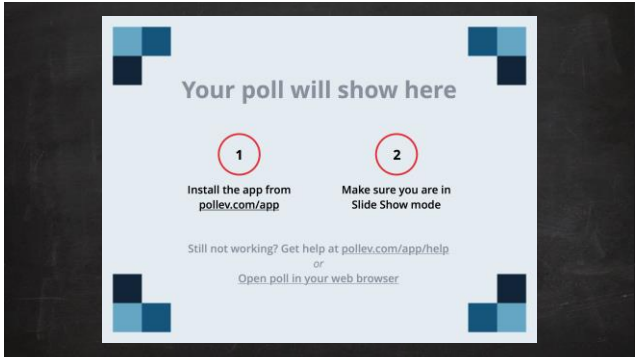
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01 EMBRACING TECHNOLOGY

- Less Paper
- Documents in the Cloud
- Client Portals
 - Web accessible Client-facing Services
- Prescribe Apps to Your Clients
 - Rick Richardson, CPA.CITP



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02 SPECIALIZATION

65% of SMBs surveyed said:


“I want my CPA to be a specialist in my industry.”

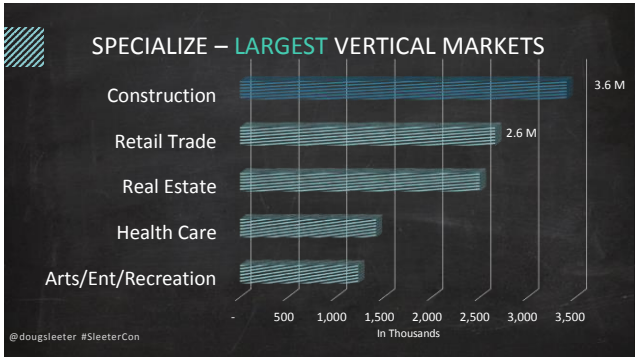


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“I’ve focused on a few things.”

- Bill Gates





SPECIALIZATION LEXICON

Vertical Focus	Hyper-Vertical Focus	Process/Service Focus
Medical	Urgent Care Centers	POS/Payments
Restaurant	McDonald's Franchises	Outsourced Acct
Real Estate	Commercial Real Estate	CFO
Retail	Jewelry Stores	Inventory
		Payroll
		IT/Security

Successful Case Studies

Caren Schwartz
Legal

Leslie Shiner
Construction

Seth David
Commercial Real Estate

Bob Crook, Steve Green, David Glantz, Will English
Point of Sale

Jeanne Taravezitz
Inventory Control

WHAT FIRMS WANT

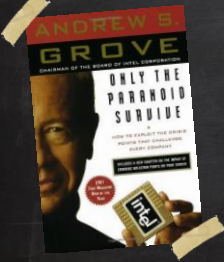
- The firm is **only as good as its people**
- The firm's goal is to hire:
 - The Best Skills
 - Team Players
 - Continuous Learners
- Your Ability (Expertise) Matters
- But Your Agility is What Builds Your Long-Term Value



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AGILITY TRUMPS ABILITY

“Only the Paranoid Survive”



- Strategic Inflection Points
- Career Inflection Points
- 10X Changes

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LEARNING – THE ULTIMATE VALUE ENHANCER

$$L > C^2$$

To maximize your value, you must learn

- Faster than the rate of change
- Faster than your competition

BUSINESS LEARNING INSTITUTE
Tom Hood CPA/CITP, CGMA – Business Learning Institute
