

## Beyond Bookkeeping: Your Guide to a Profitable Client Accounting Services Practice

<p>About the Program</p>	<p>There is a common misconception that CAS requires a strategic shift at accounting firms. In our experience with firms of varying sizes, it's simply not true. Offering CAS is essentially an extension of what your firm currently does, or can do very well. Firms don't need to massively "transform" to offer CAS. However practitioners do need to do a few things differently from a traditional bookkeeping/payroll or small business practice to succeed in CAS—particularly as it relates to adding advisory services. They often need to alter their understanding of what they are truly delivering—outcomes vs services, This program takes participants through what they need to consider (and maybe add to their practices) in order to level-up.</p> <p>This is program can be completed in 6 months and helps offer practitioners a roadmap to more successful CAS practice. Participants will develop a common vision for of the practice-- customized for their firm (vs. a cookie cutter approach that is one size fits all). The <b>Cornerstone</b> sessions cover concepts all firms need to understand and evaluate for their firm. Then, during the individual coaching sessions – a TWG consultant will guide you through understanding how each of the concepts can be aligned and tailored to your firm. TWG consultants also will help participants understand new metrics and KPIs to assure firm leaders that the practice is successful.</p> <p>In addition to the concepts and strategies shared during the sessions, participants will receive the following as tools and checklists to support implementation going forward.</p> <ol style="list-style-type: none"> <li>1. A workbook to capture your ideas and work through the concepts of design and growth presented during the Cornerstone sessions</li> <li>2. A revenue goal setting worksheet and pricing tool with step-by-step usage instructions</li> <li>3. Before, During and After checklists – to be sure participates are doing the right things, the right way as they design and grow the practice</li> <li>4. A tool for identifying service opportunities</li> <li>5. Implementation guidance for specific marketing activities</li> </ol> <p>Finally, you'll learn sales and marketing strategies that can be applied beyond your CAS practice to other areas of your firm. These strategies can be used create a framework in which you can train younger staff on the behaviors of business advisors early in their career to make them meaningful contributors to revenue growth both now, and as they grow with the firm.</p> <p>The program may be expanded with additional coaching calls, if needed.</p>
<p>Who Should Attend</p>	<ul style="list-style-type: none"> <li>• Managing Partners</li> <li>• Partners or other CAS leaders</li> <li>• Firm Growth Partners</li> <li>• Newer partners looking to make an impact in their firms</li> </ul>

<b>Learning Objectives</b>	<ul style="list-style-type: none"> <li>• Understand the “big picture” of designing and growing CAS</li> <li>• Evaluate what fits/doesn’t fit into your firm’s vision of CAS</li> <li>• Gain buy-in with key stakeholders in your firm for your vision for the practice</li> <li>• Learn the process of setting a relevant topline revenue goal</li> <li>• Identify and target your ideal CAS clients</li> <li>• Track the KPIs of managing CAS</li> <li>• More effectively implement growth activities</li> </ul>																		
<b>Dates/ General Timing of Sessions:</b>	<table border="1"> <thead> <tr> <th></th> <th><b>Dates</b></th> </tr> </thead> <tbody> <tr> <td><b>Cornerstone 1: Designing the Practice (100 min internet based, 2 CPE)</b></td> <td><b>Month 1</b></td> </tr> <tr> <td>Coaching call 1</td> <td>Month 1</td> </tr> <tr> <td>Coaching call 2</td> <td>Month 2</td> </tr> <tr> <td>Coaching call 3</td> <td>Month 3</td> </tr> <tr> <td><b>Cornerstone 2: Implementation (100 min internet based, 2 CPE)</b></td> <td><b>Month 4</b></td> </tr> <tr> <td>Coaching call 4</td> <td>Month 4</td> </tr> <tr> <td>Coaching call 5</td> <td>Month 5</td> </tr> <tr> <td>Coaching call 6</td> <td>Month 6</td> </tr> </tbody> </table>		<b>Dates</b>	<b>Cornerstone 1: Designing the Practice (100 min internet based, 2 CPE)</b>	<b>Month 1</b>	Coaching call 1	Month 1	Coaching call 2	Month 2	Coaching call 3	Month 3	<b>Cornerstone 2: Implementation (100 min internet based, 2 CPE)</b>	<b>Month 4</b>	Coaching call 4	Month 4	Coaching call 5	Month 5	Coaching call 6	Month 6
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<b>Fee</b>	<p>\$8,500 (includes six coaching calls)</p> <p>Additional coaching is available. Fees will be determined based on scope.</p>																		