

Day 1: Business Fundamentals for a \$1M Bookkeeping Firm

- **Fundamentals**
 - Unlocking Your Identity: The Power of Core Values
 - Leading with Intention: Crafting a Mission That Drives Growth
- **Communication**
 - Meetings That Multiply Your Impact
- **Workflow**
 - Mastering the Work: Simple Systems for Workflow & Status
 - Managing the Chaos: A Smarter Way to Handle “Ask Client” Questions
- **Resources**
 - Your Essential Tech Stack: Tools That Scale Your Firm
- **Marketing & Sales**
 - Discovery Calls with Confidence: How to Lead the Conversation
 - Winning the Client: How to Review Their QuickBooks File Like a Pro
 - The Irresistible Proposal: Pricing and Packaging That Close Deals
- **Business Development**
 - What to Measure: The KPIs That Drive a High-Performing Bookkeeping Business
- **Implementation: Client Onboarding Checklist**
 - Onboarding That Works: A Proven Client Onboarding Checklist

Day 2: Bookkeeping Fundamentals & Fixing the Most Common Errors

- **Basics**
 - Financial Statements Made Simple: What They Really Tell You
- **Set Up**
 - Organized Books Start Here: Building a Smart Data & Folder Structure
- **Common Errors**
 - Payroll Pitfalls: How to Spot and Fix the Biggest Mistakes
 - Asset Errors Demystified: Cleaning Up Fixed Assets & Depreciation
 - Liability Mistakes: Loans, Credit Cards, and Balances That Don’t Tie Out
- **Deliverables**
 - Monthly Deliverables: Producing Clean, Accurate Financials Every Time
 - Year-End Workpapers: Building Bulletproof Tax Packages
 - Estimated Taxes: How to wow your clients and CPAs with this often-neglected task
 - Business & Property Tax: Gathering and Delivering What Your Clients Need