

Do You Still



Love

Your Business?

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If someone would have asked me this years ago, I would have answered “no”. I was working all the time, nights, and weekends. It was horrible. I was missing my daughters growing up. Yes, I was home with them but working at home. This was not what I really wanted for myself or my family. It just happened.

In 2016, my business partner, Lynn and I decided that we wanted to be able to work from anywhere, so we quickly implemented technology. That was all great except for the fact that we were **working** from anywhere! So instead of just working at the office all the time we were taking “vacation” to work! How much sense does that make? Every trip that we were on with our kids we were working from a backpack while our kids were waiting on us. In 2019, we decided that we were done working like this. We knew we had to change this business.

We decided we needed to take a step back and start really identifying what we wanted from the business and how we were going to get there. That was a very hard discussion, and we made some tough decisions. One was that we needed to stop growth in the firm. We were drowning in work, which is good except it left us no time to make the changes we wanted to make. We had a very large client that was taking over our firm. It was clear that if we did not change something, that client was going to take over us.

We started slowly documenting all our processes and really started identifying our systems. We went through every piece of technology we had to see which ones we really used and valued. I cannot tell you how much wasted technology that we never fully embraced we were able to get rid of. We never fully embraced them not because we just loved implementing them and not using them, we did not have the need for them anymore. We were in so much pain when we purchased and implemented them that we were hoping they would solve our pain, but that was not the case.

It was not until we realized that we needed to take some time and pull the covers back on everything in the firm that we saw was the ugly truth. We had way too many clients with so many different processes, systems, and ways of doing things, it was crazy! Our pricing was way too low, and we were too conforming to our clients. We had so much scope creep that it was no wonder we were working all the time. We were not putting our own business first. We were more concerned with their business than our own.

It took us a couple of painful years to get out of this, but it has been well worth it. We now have clients that value what we do and do not have to fight with on a regular basis. Lynn and I have very little client work on our desk now. We have really reduced the number of clients that we work with, but they are larger engagements providing much more value.

Our large client that was taking over our firm is no longer with us. They tried to change every piece of technology that we used behind the scenes and were trying to dictate how we operated. If we had not been preparing for this, we would have been pulled straight into their mess. Separating ways with that client turned out to be the best thing for our firm. Once we no longer had to spend the time messing with them it opened the time we needed to really work on our business. While this was a longer-term process for us, I am glad to be coming out of it on the other side now.

We all really enjoy the clients that we work with now. While we still offer bookkeeping our focus is on advisory work. Advising is really the work we enjoy doing. We are very passionate about helping other accountants, bookkeepers and tax professionals regain the business they started and dreamed about. Since I was in management before going to accounting, I have found my love for developing people again. I never realized how much I had missed it until I started doing advisory with our clients.

Talking with so many other accountants, bookkeepers and tax professionals led me to this path. There are so many that want to change their business but they just do not know how or they just need someone to guide them through the process that has been where they are. They need someone to hold them accountable to make those changes. If that is you, Let's talk!

If you want help taking a pause and changing your firm, contact us for a FREE strategy call.

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