



Past		Present			Future	
What are you most proud of?		What are you most confident about?		What are you most excited about?		
Wins	Why	•		•		
		•		•		
		•		•		
		•		•		
		•		•		
This 6-week cycle What do yo	u want from this 6-week cycle?					
	2	3	4		5	

Bookkeeping Business Blueprint

This blueprint lays out the different stages you will go through as you build your bookkeeping business, what to focus on at each level, what to expect, and some basic benchmarks.

STAGE	FOCUS	REVENUE	SALARY	PROFIT	VALUE	OFFICE	STAFF HRS/ WEEK	DAYS B/K	ADMIN	GM
6	Exit	\$600k-\$1M+	\$110k- \$200k	\$120k- \$200k+	\$650k- \$1.5M+	Small / Medium	250-400	0	Operations Manager	2IC
5	Leverage	\$500k	\$90k	\$100k	\$500k	Small	200	0	Operations Manager	You
4	Environment	\$400k	\$90k	\$80k	\$300k	Small	150	1/2	Operations Manager	You
3	Activity	\$300k	\$85k	\$60k	\$150k	Home	100	1	You	You
2	Value	\$200k	\$70k	\$40k	\$75k	Home	50	2	You	You
1	Decision	\$100k	\$60k	\$20k	\$25k	Home	0	5	You	You



VALUE = possible sale price of bookkeeping business

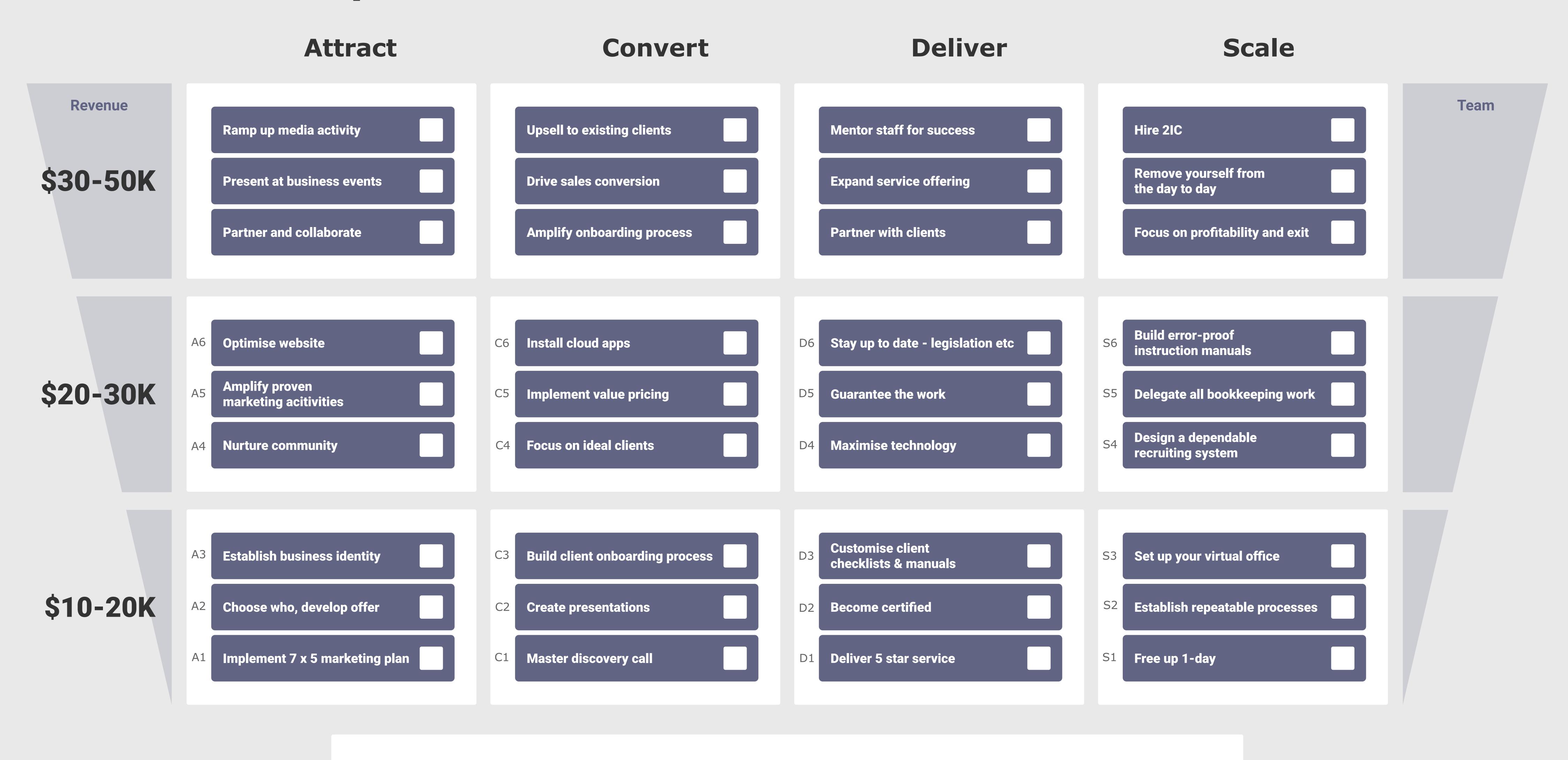
DAYS B/K = days doing bookkeeping for clients

2IC = second-in-command

Compass

Vision ● What do you see for the year ahea	id?			
Focus • What's the next right thing?				
Money • My belt target for the next 3 m	onths			
			7	
\$100k	\$200k \$300k	\$400k \$500	t COOL 1M	
New Clients • How many new clients over		Clients This Week • How many		
New Clients • How many new clients over	the next 3 months?	Clients This Week • How many		
	the next 3 months?	Clients This Week • How many		
New Clients • How many new clients over	the next 3 months? his work important? Who does it imp	Clients This Week • How many pact? How does it effect them?	clients each week?	
New Clients • How many new clients over the second	the next 3 months? his work important? Who does it imp	Clients This Week • How many pact? How does it effect them?	clients each week?	
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New Clients • How many new clients over the second	the next 3 months? his work important? Who does it imp	clients This Week • How many pact? How does it effect them?	clients each week?	
Meaning • Impact & Effect • Why is the	the next 3 months? his work important? Who does it imp	clients This Week • How many pact? How does it effect them?	clients each week?	
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Meaning • Impact & Effect • Why is the second secon	the next 3 months? his work important? Who does it imp	clients This Week • How many pact? How does it effect them?	clients each week?	
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Meaning • Impact & Effect • Why is the second secon	the next 3 months? his work important? Who does it imp	Clients This Week • How many	clients each week?	
Meaning • Impact & Effect • Why is the second secon	the next 3 months? his work important? Who does it imp	Clients This Week • How many	clients each week?	

Your Roadmap to Success



The Next Right Thing



Th	e ·	<\$20K Focus Finder™		
Attract	А3	I have a Mission Statement and am clear on my business's purpose		
	A2	I know who my ideal customer is and know my services I offer		
	A1	I have a variety of marketing strategies to get new clients		
Convert	C3	I have a client onboarding process that works well		
	C2	I have a prospect presentation that clearly shows my value		
	C1	I am confident with my sales conversations		
	D3	I feel skilled to deliver accurate and efficient client work		
Deliver	D2	I have documented checklists and instructions with everything out of my head		
	D1	I can guarantee a 5 star service for my clients with nothing dropping through the cracks		
	S3	I could confidently handover client work to a staff member		
Scale	S2	I have a system in place for all repeatable tasks		
	S1	I have at least 1 full day per week to work ON scaling my business		



The >\$20K Focus Finder™				
Attract	A6	I have a website that attracts prospects and a method for them to contact me		
	A5	I have systemised my marketing activities so that I can turn them on and off as needed		
	A4	I have a post onboarding system to nurture new clients		
	C6	I have my tech stack that creates efficiencies		
Convert	C5	I mostly use value or fixed pricing		
O	C4	My client base is made up of A or B clients that appreciate me and with whom I enjoy working		
Deliver	D6	I have the time and can easily update my checklists for changes when needed		
	D5	Any staff could pick up a piece of work and know what and how to do it		
	D4	I have a community I can ask to find out about technology to assist me and my clients		
Scale	S6	My client's instruction manuals are complete		
	S5	I am confident to delegate most of the work to my staff trusting the systems I have put in place		
	S4	I know how to recruit and have a method to skills test and induct staff		







The Next Right Thing™

PROJECT NAME:

WHAT ARE THE (1-6) BIG CHUNKS OF WORK TO DO? **Problem** | What problem are we solving? Impact | What difference will it make? WHAT ARE THE (1-3) NEXT ACTIONS TO GET THIS STARTED? Outcome | What does "done" look like?



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