Building a successful bookkeeping practice
Arthur Garcia
Director of US Sales - Accounting Partner Channel
Clients referred to Xero partners every month

10k +

Accountants and bookkeepers

100k +

Subscribers on Xero

1M +
Purpose
“Drive is KEY. It’s the engine that will make you do what you need to do to get where you need to go to achieve success.”
Why do you do what you do?

The Golden Circle
Simon Sinek
Who do you want to work with?
Selecting a niche

- Big enough to matter
- Small enough to lead
- Good fit for skills and interests
New firms
Existing firms
Platform & Process
“In choosing a partner, I need to feel assured that we are both invested in each others’ growth. A partner that shows they care about the success of our business is key.”
Benefits of a cloud platform

- Automation
- Staff efficiency
- Virtual resources
- Lower cost-to-serve
- Collaborative workflows
- Application integration
Why Xero?

Real time access

Thoughtful design

Collaboration
Marketing
Define your marketing strategy

One comprehensive plan based on:

- Market research
- Business goals
- Service offering

Fundamental goal of increased revenue and sustainable competitive advantage
Communicate your WHY

Vision, mission statement

Social media presence

Intranet

Organizational identity
Marketing your firm

Xero advisory listing

Updated website

Search engine optimization

Updated LinkedIn

Create Google business account

Use social media for updates, publicity and media purposes
Measuring success
SWOT analysis

- strengths
- weaknesses
- opportunities
- threats
Defining SMART goals

Specific
Measurable
Attainable
Relevant
Time-bound
SMART Goal: Increase revenue by $220K within 12 months

Goal 1: Identify 1-2 vertical markets
  • Amy is responsible
  • Due date is 03/31

Tactic 1: Review my current client list
  • Alicia is responsible
  • Due date is 12/31

Tactic 2: Implement a lunch and learn for staff
  • Evan is responsible
  • Due date is 12/31
Action plan
How will you achieve your goals?

Who is responsible?

What is the time frame?

Collaboration - Xero account manager
Visit us to review your SMART goal

Booth #200
Questions