



THE PROFITPRO PROFITABILITY MASTERCLASS 2025

WORKBOOK 4

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PRICING FOR PROFITABILITY

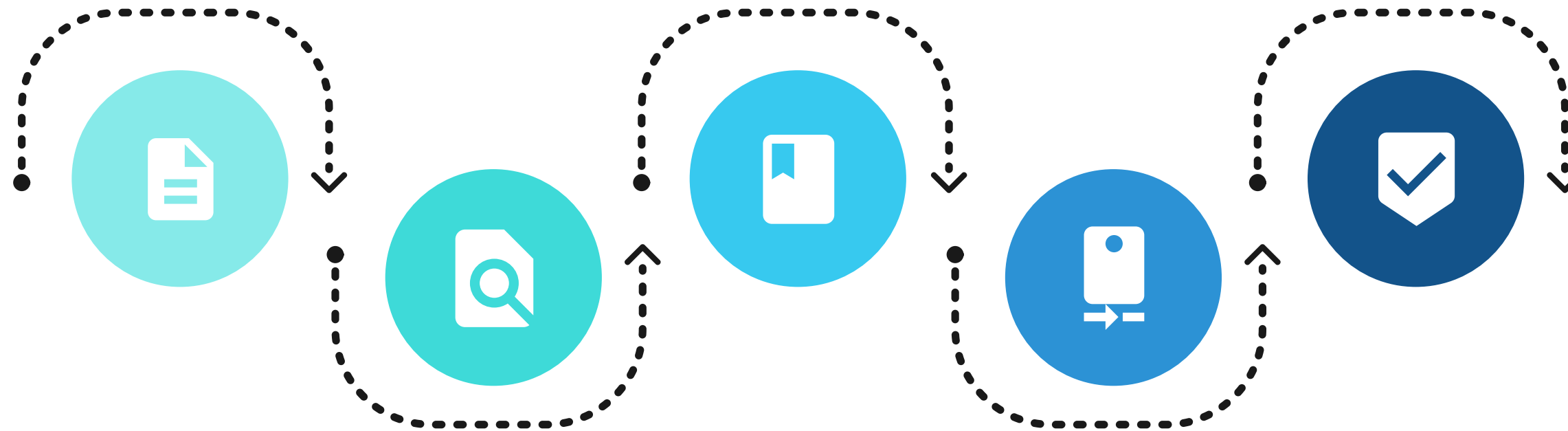
Lesson 4 & Revision
Profitability Masterclass 2025

DES O'NEILL

2025



PROFITABILITY MASTERCLASS 2025



1 - Pruning the Client List

The Ideal Client Opportunity - Client Classification & Billing Control

2 - Technology & Efficiency Transformation

Transforming your Tech in 2025 and the NOT to Do List

3 - The 6 Step Success Path

Taking real ownership with the Five Stages of Exit and your Firm Strategy Scorecard

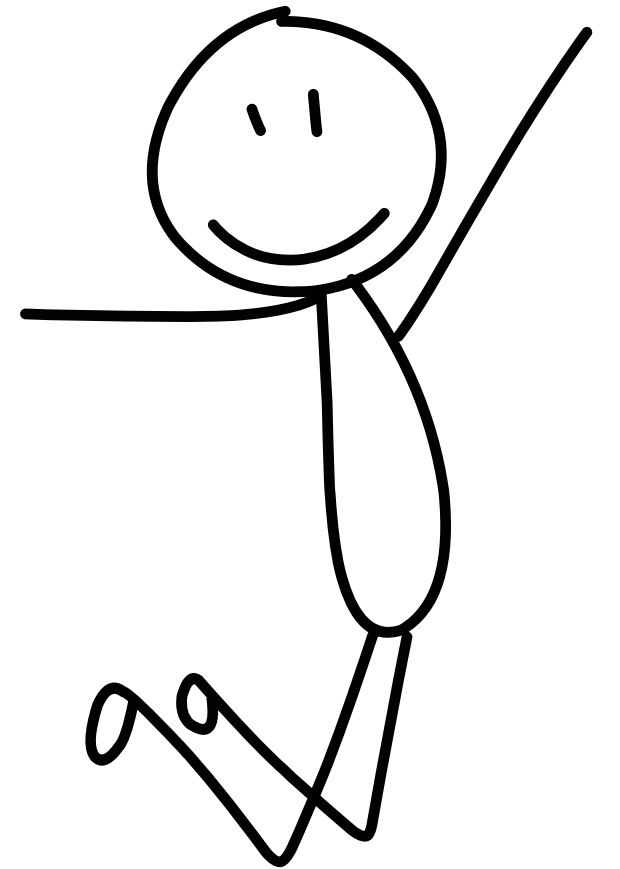
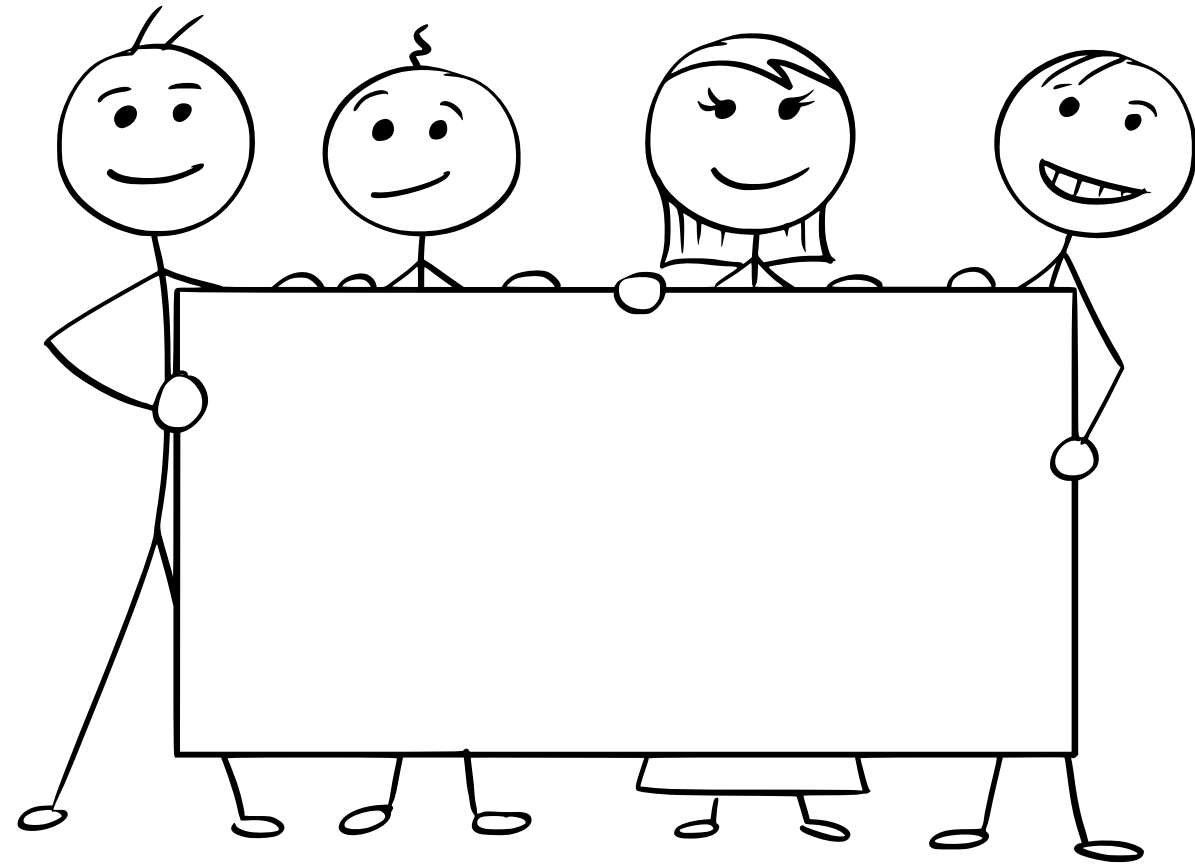
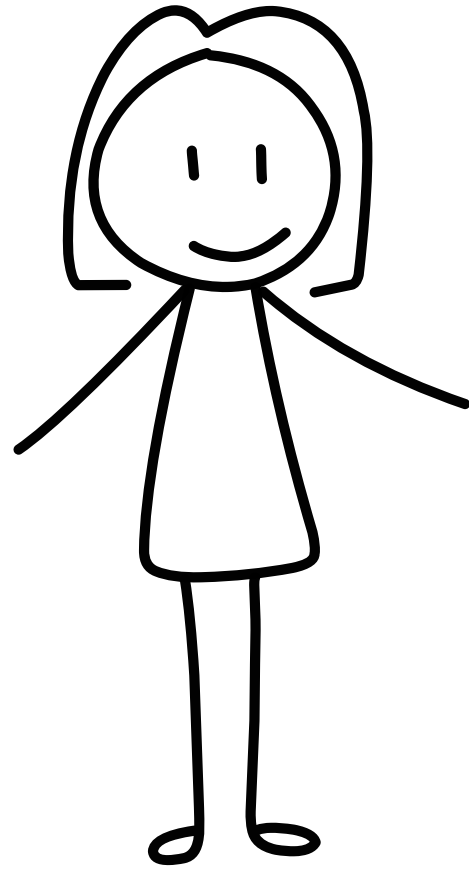
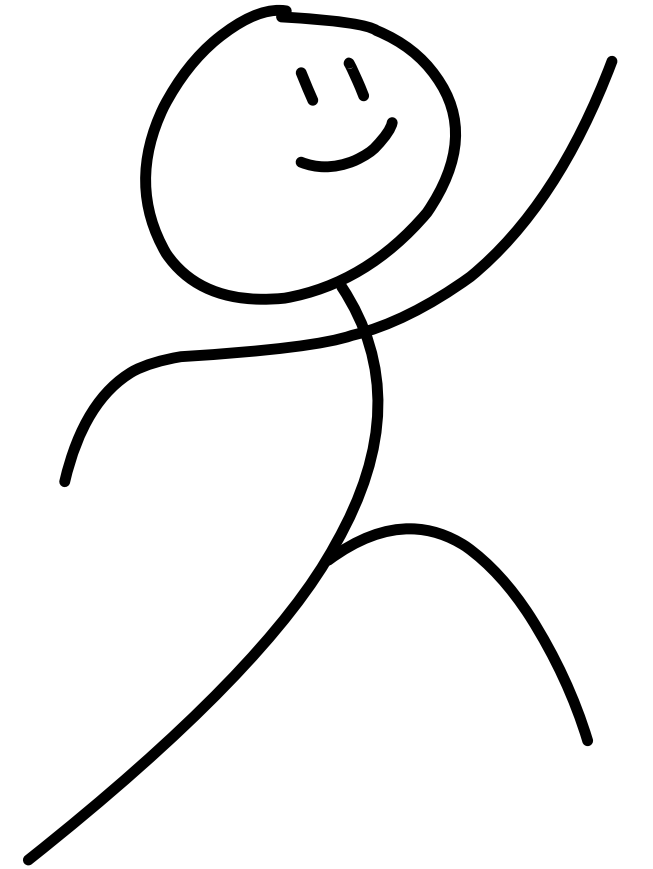
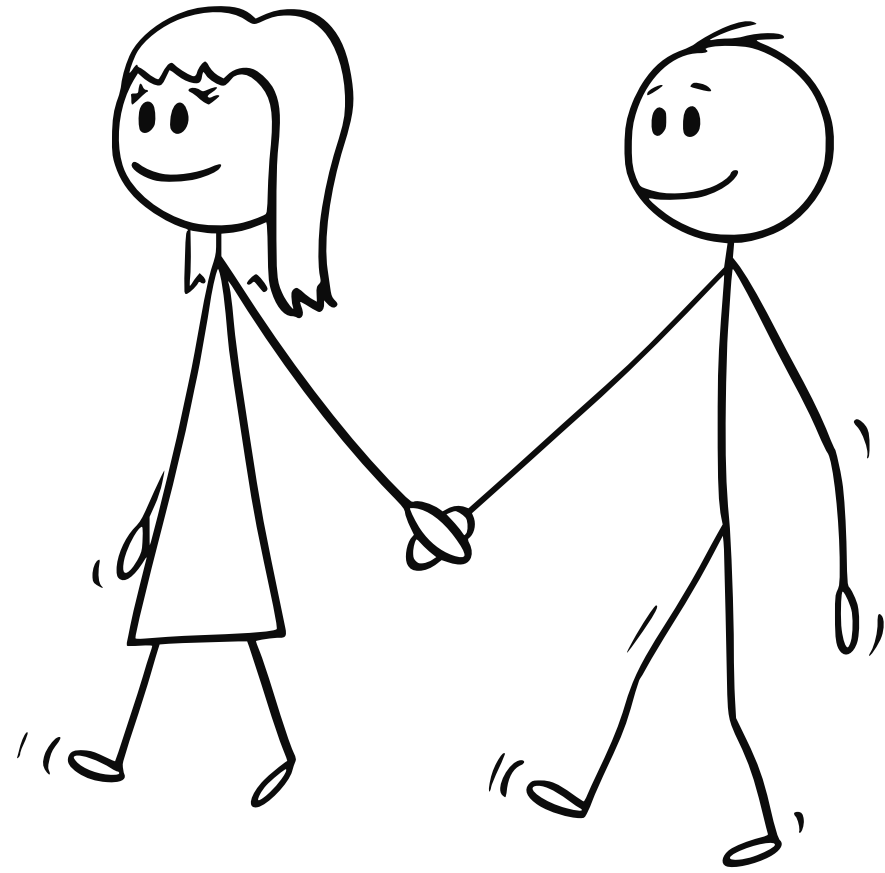
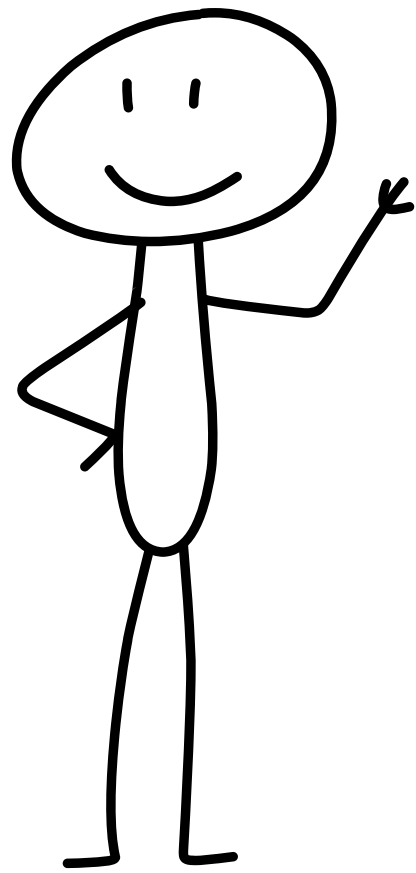
4 - Pricing for Profit

Driving Profitability by charging a fair fee for everything you do and not leaving money behind you on the table

5 - The Accountants Growth Formula Programme

A proven pathway to profitability for accounting businesses





OMNIPRO

OmniHUB



savvy people.

8|0

9|0

10

MANIFESTO



John Landy

1955

+ 3

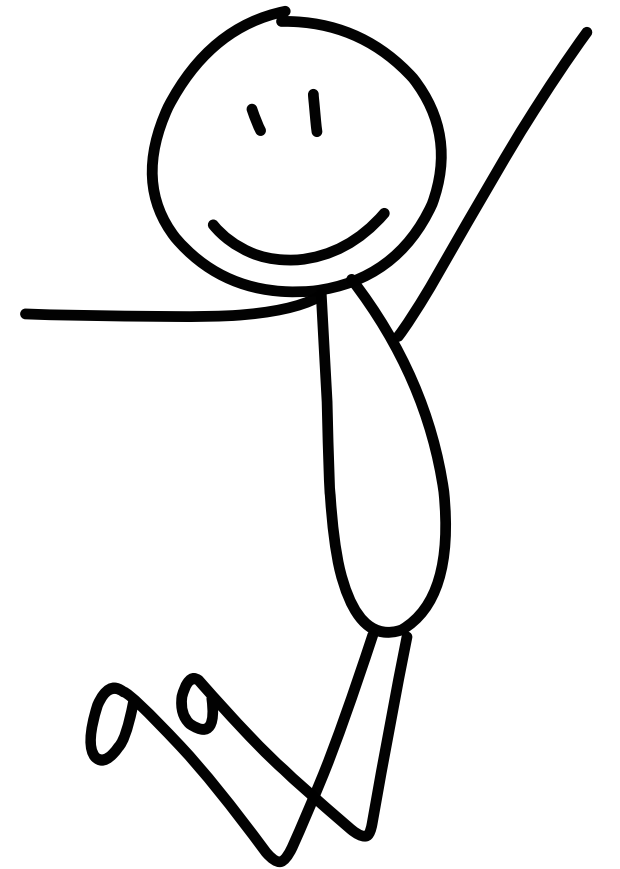
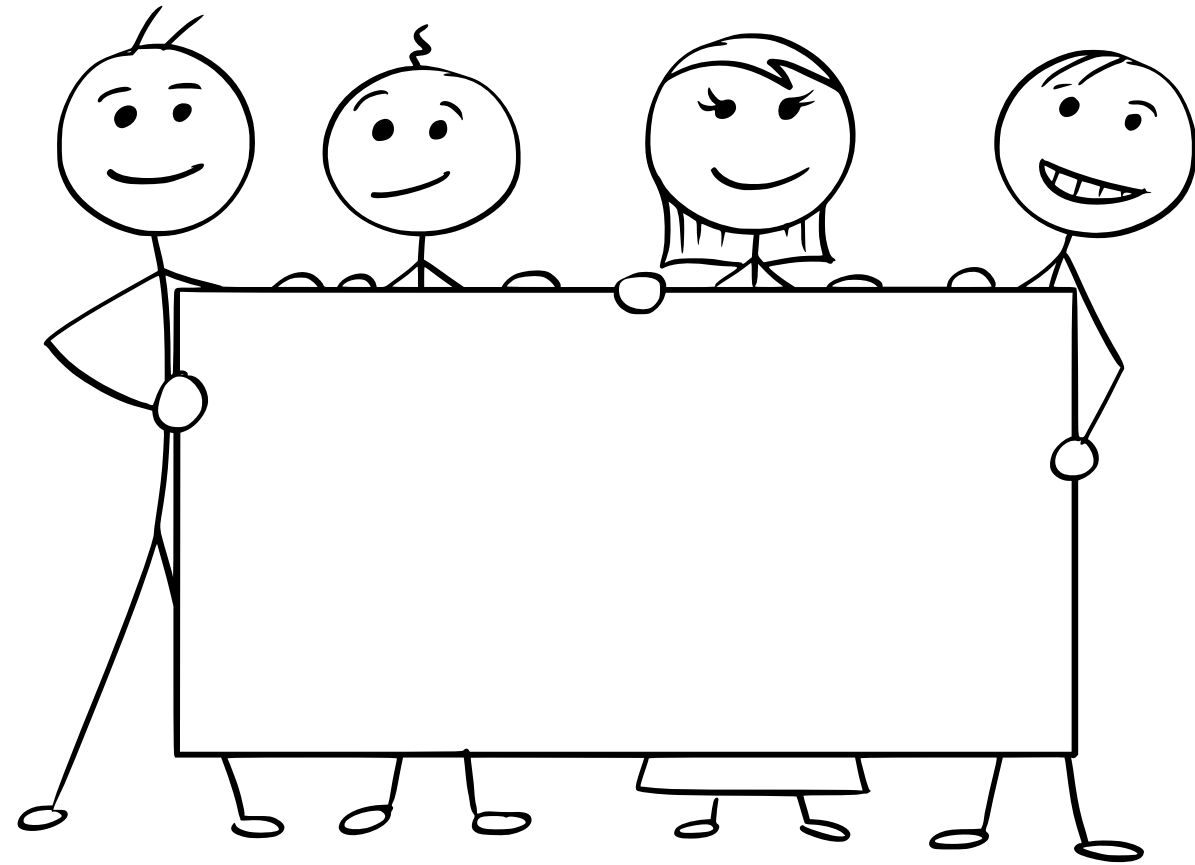
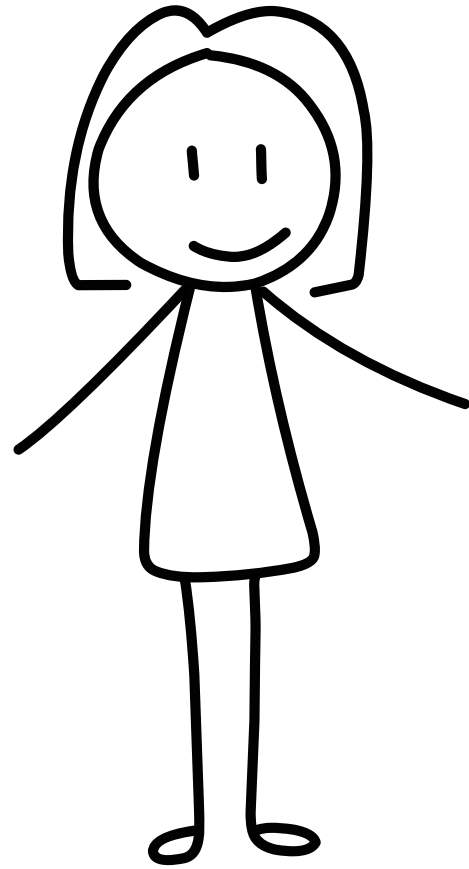
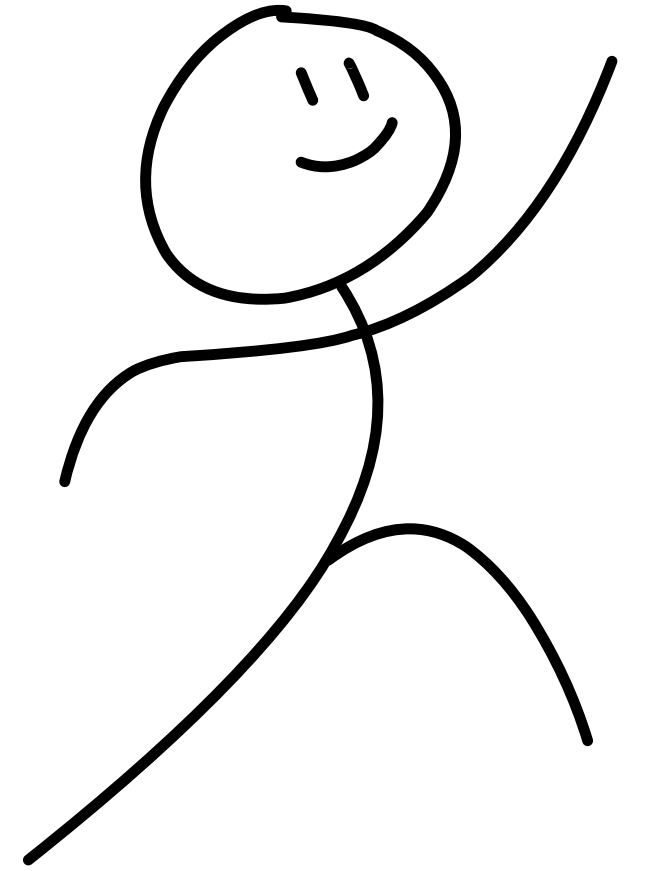
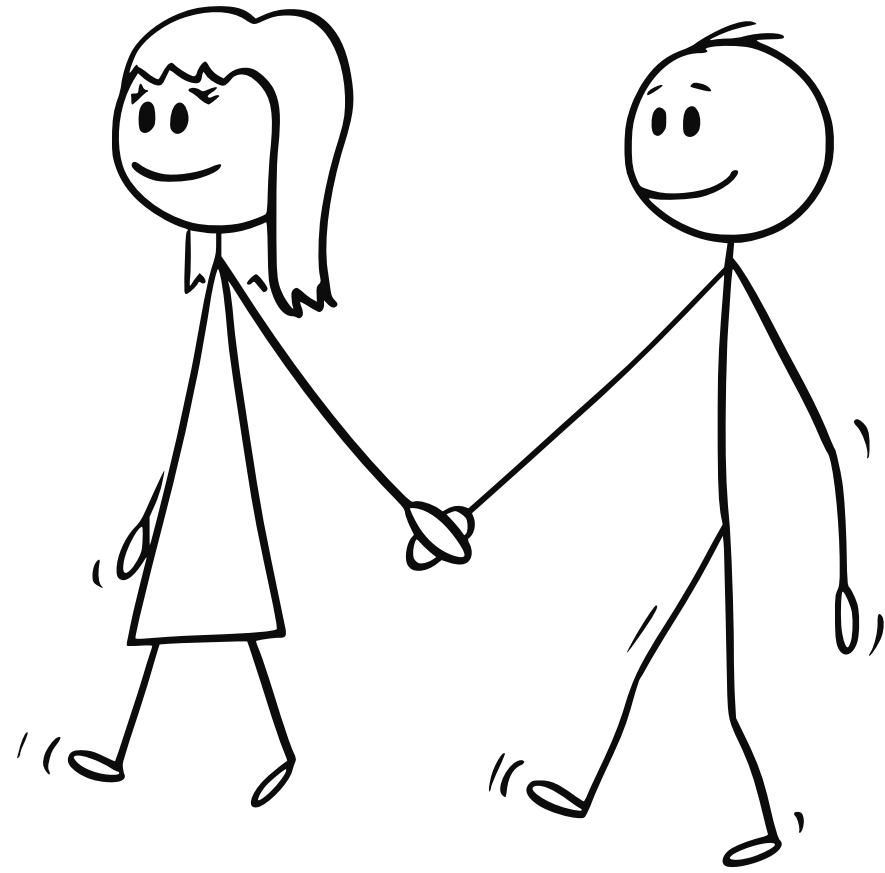
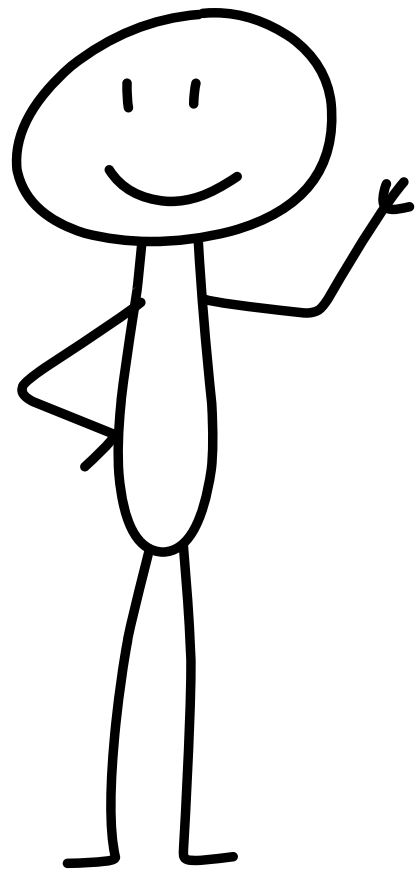
1956

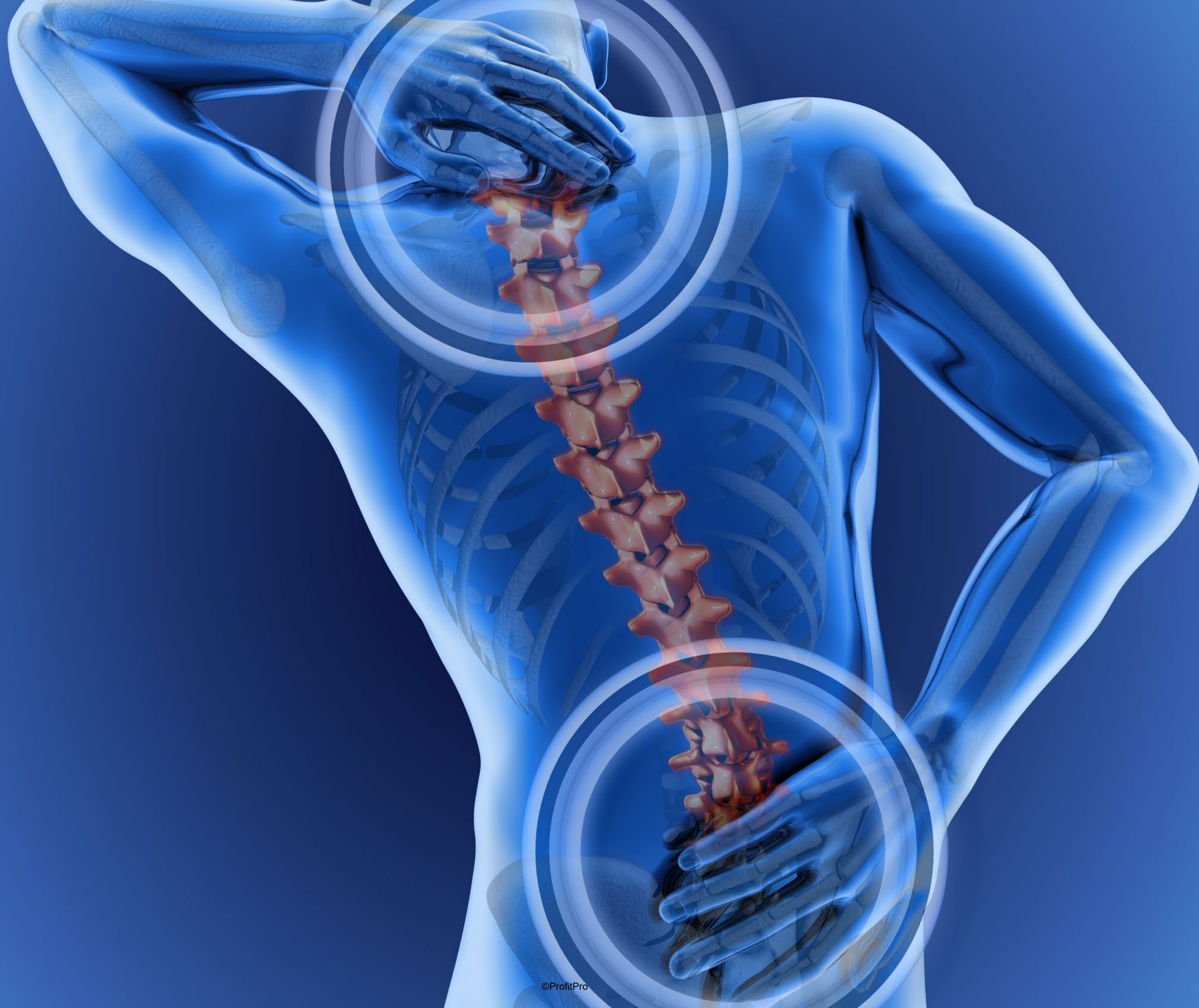
+ 5

Roger Bannister

6-05-1954









PLEASURE

The 4 Freedoms of Entrepreneurs



Time



Money



Relationships



Purpose



A 3D word cloud where the word 'BELIEF' is the central focus, rendered in large, white, blocky letters. It is surrounded by a dense field of other words in a lighter grey, also in a 3D blocky font. The words are scattered and overlapping, creating a sense of depth. The overall color palette is monochromatic, using shades of grey and white. The lighting creates soft shadows, emphasizing the three-dimensional nature of the letters.



~~WASTE TIME~~

TAKE ACTION

WHAT'S
YOUR
NUMBER?









SIDE DISHES - HOT or COLD

Individual
Large
Family

\$1.45

\$2.65

\$3.45

SANDWICHES

Open Face Hot Chicken
Cold Sandwich Lettuce, Tomato
Chicken Salad Sandwich
Sandwich & Soup

\$3.95

\$3.95

\$3.95

\$5.45

WITH ONE
SIDE

\$5.15

\$5.15

\$5.15

SOUP & SALADS

Old Fashioned Chicken Soup
Garden Salad
with Roasted Chicken
Caesar Salad
with Roasted Chicken
Soup & Garden Salad
Soup & Caesar Salad

\$2.45

\$1.75

\$3.95

\$2.75

\$4.95

\$3.75

\$4.75

Review Existing Services

List All Products

Services

Sub Divide Services

Based on Client

Classifications

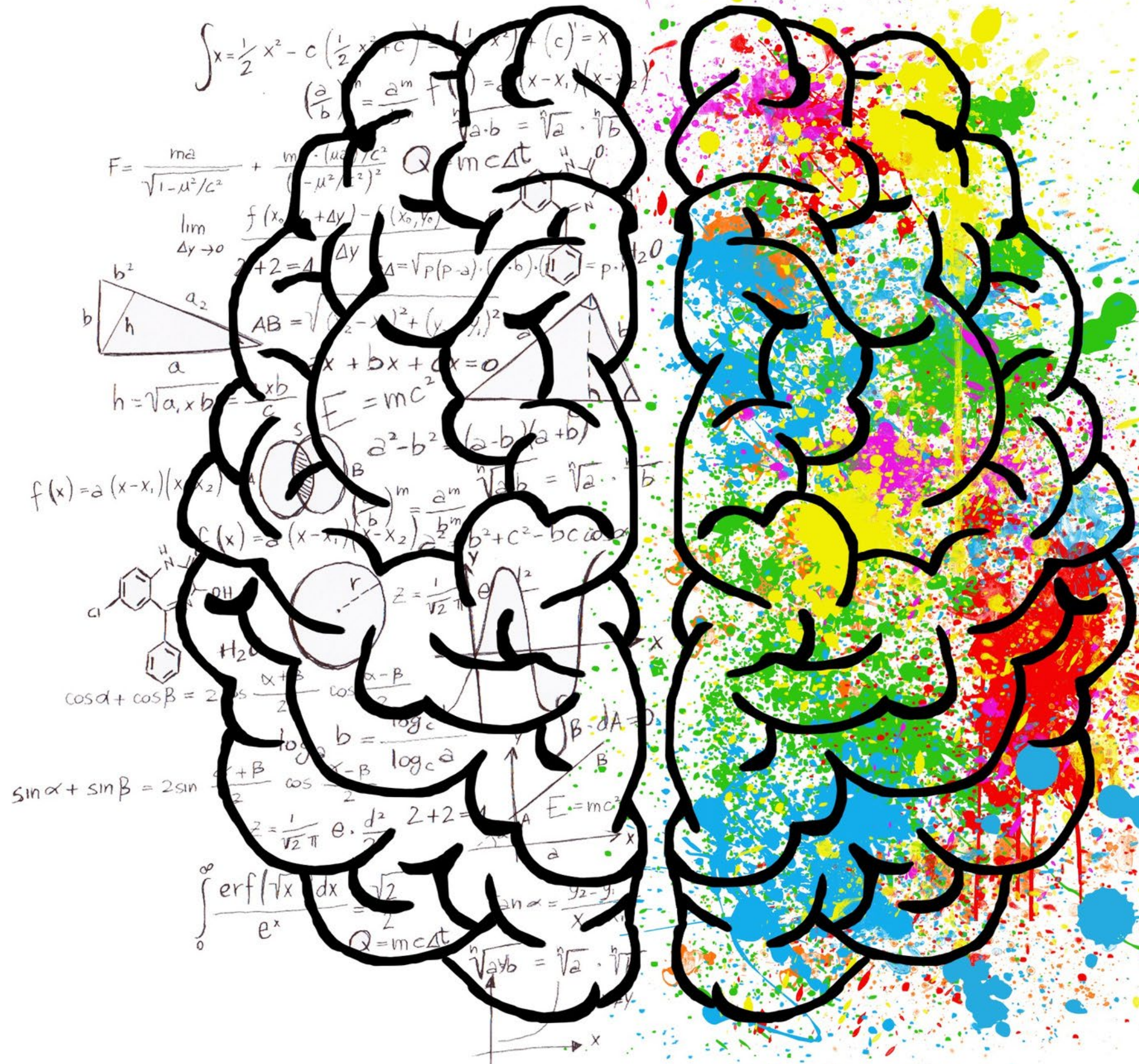
Minimum Price

Mid

Price

Optimum

Price



$$\int x = \frac{1}{2} x^2 - c \left(\frac{1}{2} x^2 + c \right) = \left(\frac{1}{2} x^2 \right) + (c)' = x$$

$$\left(\frac{a}{b} \right)^m = \frac{a^m}{b^m} f(x) = a(x-x_1)(x-x_2)$$

$$F = \frac{ma}{\sqrt{1-u^2/c^2}} + \frac{m \cdot (u^2/c^2)}{(-u^2/c^2)^2} Q = mc\Delta t$$

$$\lim_{\Delta y \rightarrow 0} \frac{f(x_0 + \Delta y) - f(x_0, y_0)}{\Delta y} \Delta = \sqrt{p(p-a)} \cdot (b) \cdot (1) = p \cdot r$$

$$AB = \sqrt{(x_2 - x_1)^2 + (y_2 - y_1)^2}$$

$$h = \sqrt{a \cdot x \cdot b} = \frac{xb}{c}$$

$$E = mc^2$$

$$a^2 - b^2 = (a-b)(a+b)$$

$$f(x) = a(x-x_1)(x-x_2)$$



$$\cos \alpha + \cos \beta = 2 \cos \frac{\alpha + \beta}{2} \cos \frac{\alpha - \beta}{2}$$

$$\sin \alpha + \sin \beta = 2 \sin \frac{\alpha + \beta}{2} \cos \frac{\alpha - \beta}{2}$$

$$b = \frac{\log c}{\log a}$$

$$Z = \frac{1}{\sqrt{2} \pi} e^{-\frac{d^2}{2}}$$

$$\int_0^{\infty} \frac{\operatorname{erf}(\sqrt{x})}{e^x} dx = \frac{\sqrt{2}}{2}$$

$$Q = mc\Delta t$$

$$\sqrt[n]{a \cdot b} = \sqrt[n]{a} \cdot \sqrt[n]{b}$$



Value

Worth

fair and suitable
desirability, utility
being useful or des



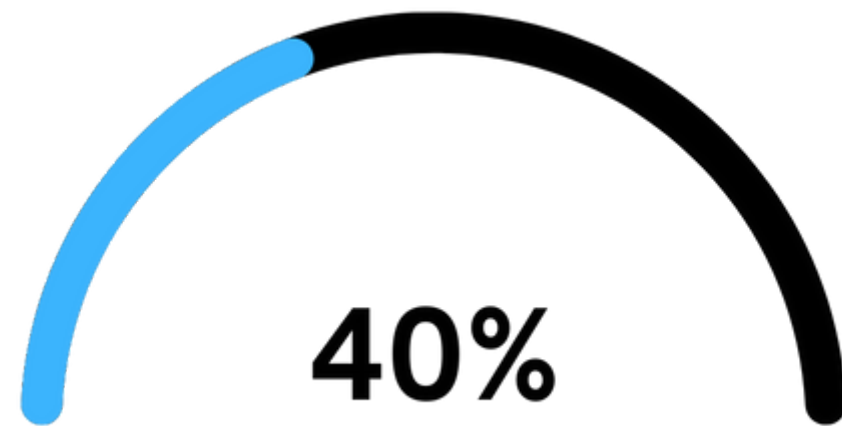


If "I know someone cheaper" were
a picture

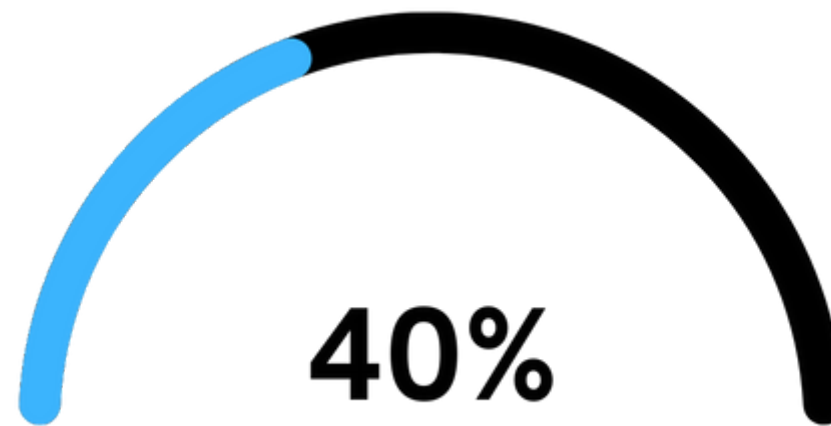


The Perception of Value

It's all about the customer. It's all about you.



**CAPTURE
THE VALUE**



**COMMUNICATE
THE VALUE**



**DELIVER
THE VALUE**



CUSTOMERS

The Number 1
Customer
The Real Number
1 Customer



STEP 1

FOWTW

Find out what they
want



STEP 2

GAGI

Go and Get It



STEP 3

GITT

Give it to Them

HABITS

CHANGES

BEHAVIOUR

OUR DEEPEST FEAR IS
NOT THAT WE ARE
INADEQUATE. OUR
DEEPEST FEAR IS THAT
WE ARE POWERFUL
BEYOND MEASURE. IT
IS OUR LIGHT, NOT
OUR DARKNESS THAT
MOST FRIGHTENS US.
WE ASK OURSELVES,
'WHO AM I TO BE
BRILLIANT, GORGEOUS,
TALENTED, FABULOUS?'
ACTUALLY, WHO ARE
YOU NOT TO BE?

~ Marianne Williamson

As we let our own
light shine, we
unconsciously give
other people
permission to do
the same.

Nelson Mandela



You must raise your
prices



John Landy

1955

+ 3

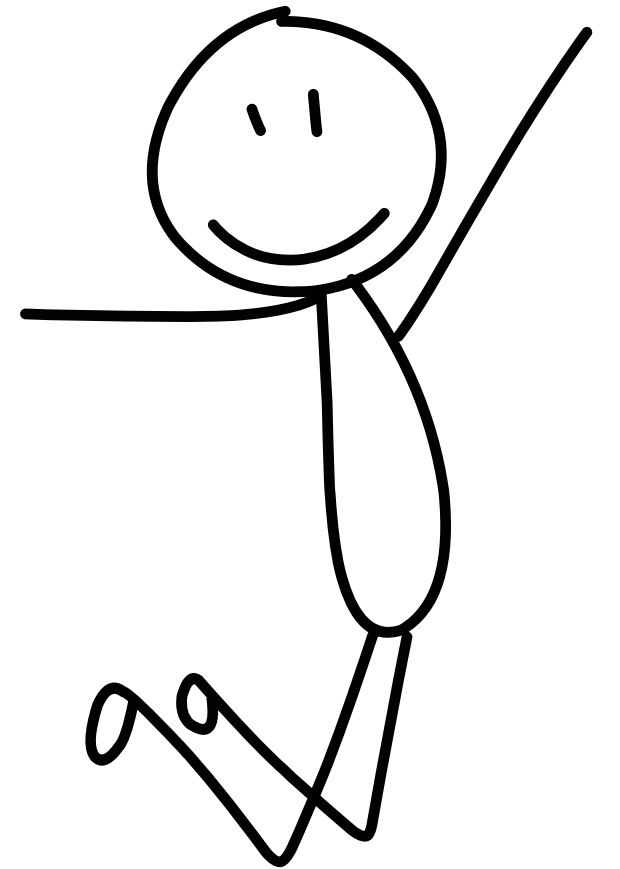
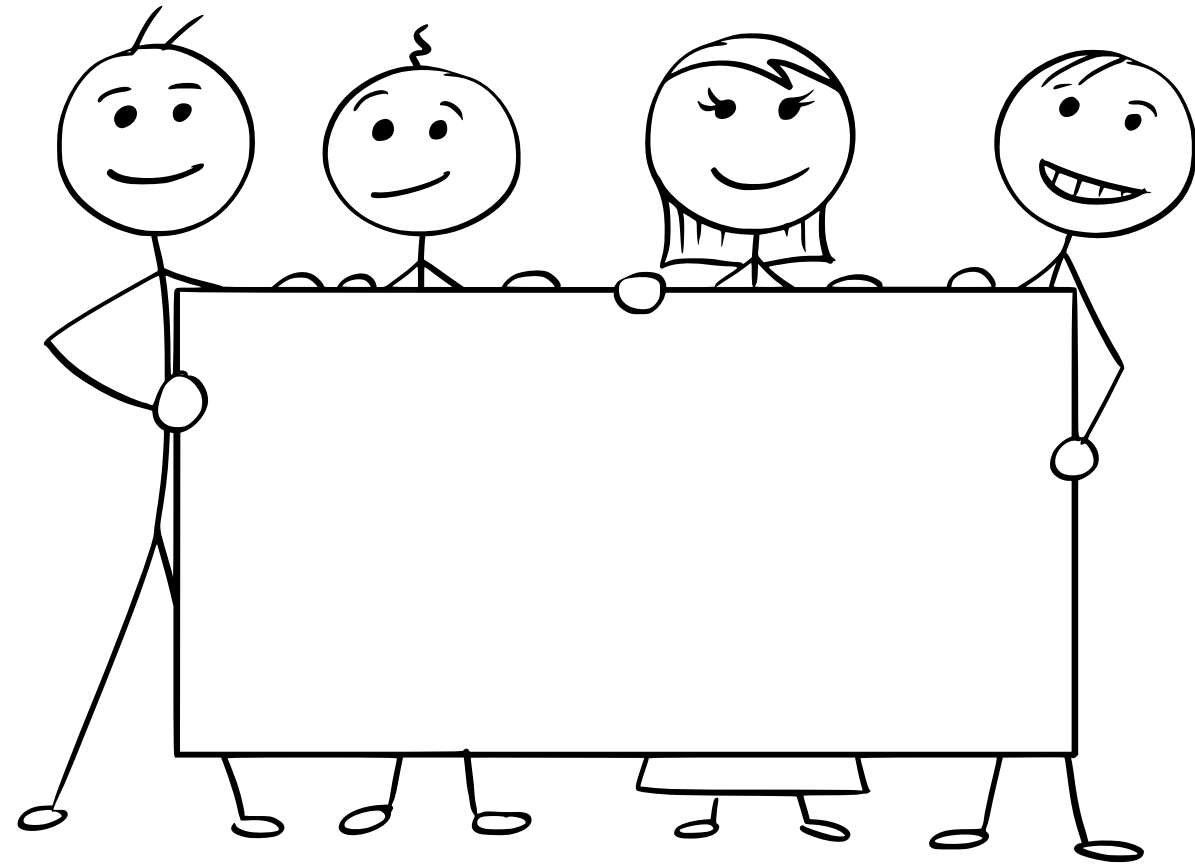
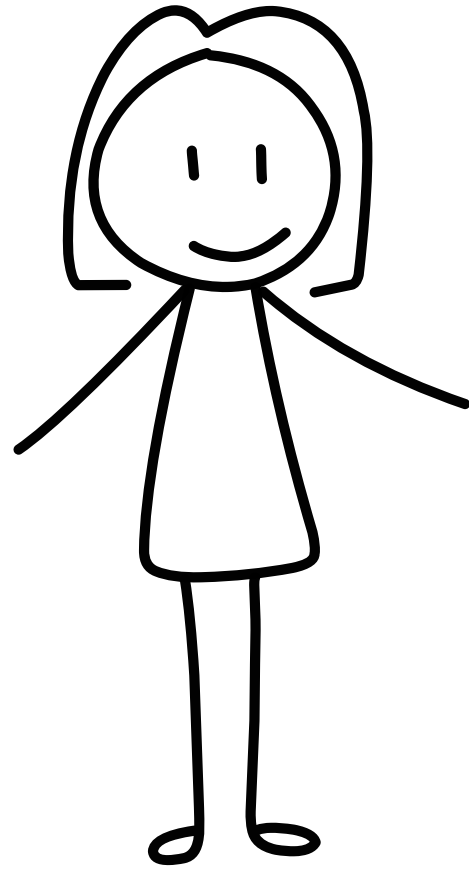
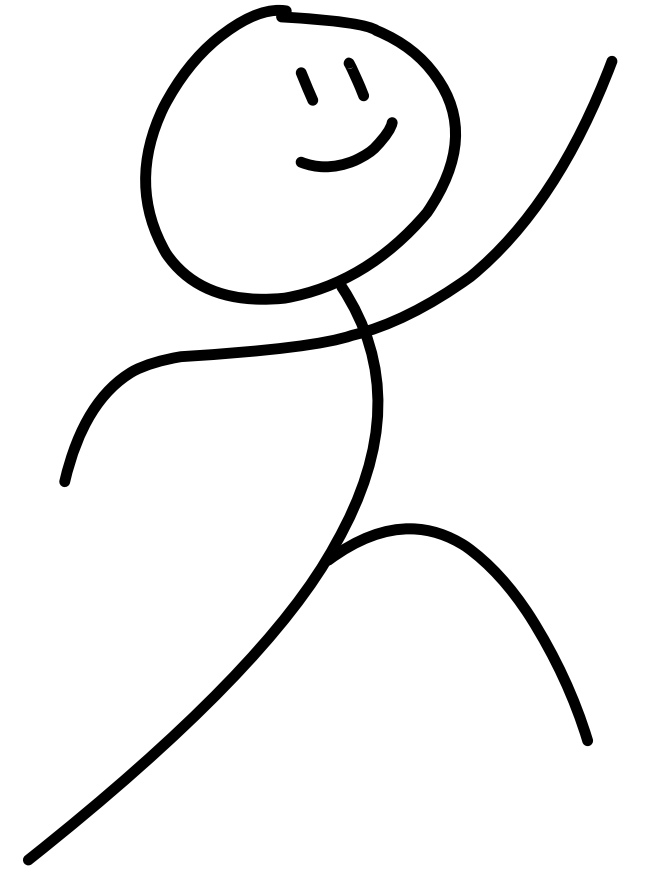
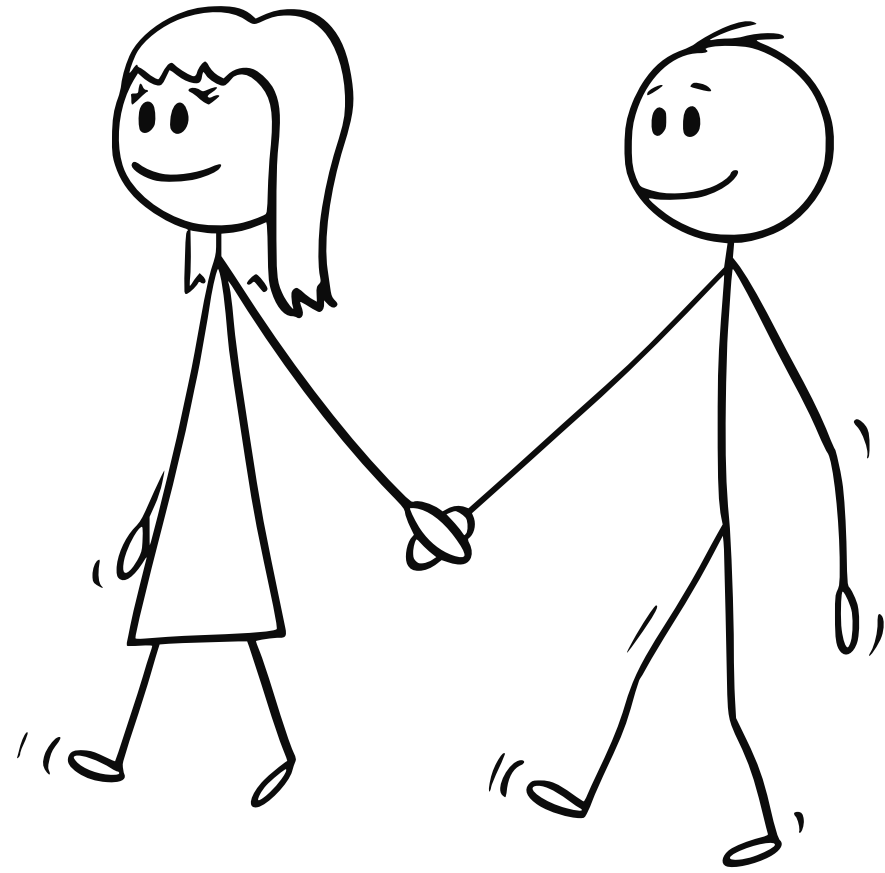
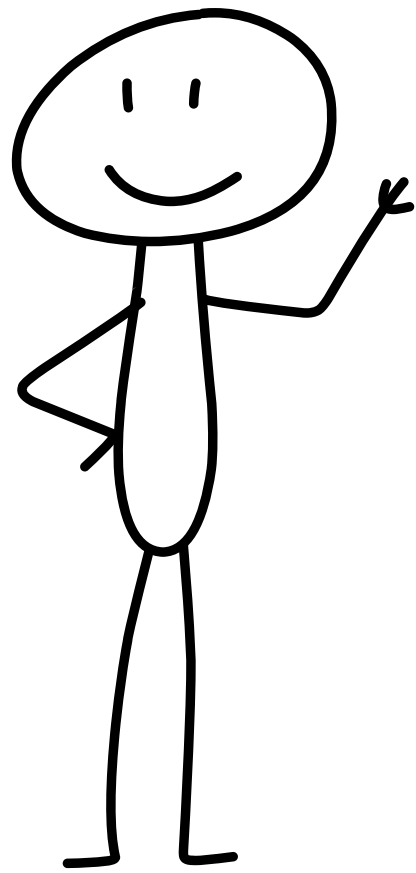
1956

+ 5

Roger Bannister

6-05-1954





What is

The Accountants' Growth Formula

- A tried and tested...
- step-by-step system...
- that helps accounting firm owners just like you...
- grow their business...
- building a saleable self-managing firm...



What do you really get

This is not about getting bigger, bigger and bigger. This is about building a business that works for you whether it is bigger or smaller or just the right size.

This is about you but it is also about a community of peers just like you.

But what do you really get by doing the 8 week Accountants Growth Formula Programme?

- Gain Knowledge by soaking up 21 years of insights that Des will share from working with thousands of firms.
- Feel more in Control by taking a positive action that will make a difference.
- Get inspired to make the decisions and to do what needs to be done.
- Become more Motivated to take the steps you need to take.
- Change your Perspective and your Thinking to get a better result in your business.
- Learn What Works and What Doesn't Work.
- Be exposed to Cutting Edge Thinking and Cutting Edge Technology.



But what do you really get by doing the 8 week Accountants Growth Formula Programme?

- See what other firms Just Like You have done to get to the next level.
- Make real, tangible progress over the 8 weeks.
- Gain Confidence from a combination of the knowledge, inspiration, motivation and progress.
- Feel Connected by going through this with other firm owners just like you.
- Be Held Accountable to take action for your most important customer – Your Business!
- You will see Results that will improve your business.



AGF 8 Week Programme Value

€1,997 / £1,697

If You Join by 27th of February You also get these Registration Bonuses

Bonus 1- Mastermind Day

Choice of In-Person Mastermind or Virtual Mastermind with your fellow Accountants Growth Formula Participants in June 2025 to share your experiences and insights and practically implement the learnings of the programme

Value € 750/£650

Bonus 2 - ProfitPro Live 2025.

A day 2 in person immersive event in May 2025 where you get to learn from your peers, learn from experts and take 2 days out from the busyness of business to focus on you and your business.

Value € 347/£297

Bonus 3 - The Cash Generator Bootcamp.

A 10 part Training Programme with 1 Bonus live webinar for you to ask your questions, bringing you through practical tactics and proven strategies that you can apply in your firm to generate 10 times return on your investment in this programme.

Value € 197/£167

Bonus 4 - Finding 3 Hours Per Week – 10 Steps to Win Your Time Back.

We are leaving nothing to chance. In this 10-Step Programme we are going to show how to find a minimum of 3 hours a week. I am sure you will have plenty of uses for the extra hours.

Value € 197/£167



What do you get when you join

The Accountants' Growth Formula Programme



6 Modules of AGF Blueprint

Strategy, People, The 4 Ps (Proposition, Product, Pricing, Positioning), Customers, Business Growth and Leverage & Scale

Weekly Releases in Manageable Chunks

Each module is released over 8 weeks starting in February and running to April.

A Weekly Live Call

You turn up and we do the work together on the call focusing on the module just released

24/7/365 Access to our AGF Members Portal

All the tools, workbooks and lessons are available to you whenever you want to access them, however you want to access them, wherever you want to access them.



Sign up Bonusses – If you sign up Before Midnight on Thursday 27th of February

Bonus 1	Mastermind Day	Value	€750	£650
Bonus 2	ProfitPro Live 2025	Value	€347	£297
Bonus 3	The Cash Generator Bootcamp	Value	€197	£167
Bonus 4	Finding 3 Hours Per Week – 10 Steps to Win Your Time Back	Value	€197	£167
Total Combined Bonus Value			€1,491	£1,281

New Bonus Added – AI and Automation Masterclass May 2025

- AI & Automation Masterclass
- 8 Weeks
- Global Experts
- Practical Application of AI and Automation for SME Accounting Businesses
- Actionable Steps
- Implementation
- Upping your technology game
- Efficiency and Personal Effectiveness
- Led by Des O'Neill
- Live sessions with Q&A
- Recordings available for you and your team
- Implementation Help-sheets

Value €1,997/£1,697

Sign up Bonusses – If you sign up Before Midnight on Thursday 27th of February

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Bonus 2	ProfitPro Live 2025	Value	€347	£297
Bonus 3	The Cash Generator Bootcamp	Value	€197	£167
Bonus 4	Finding 3 Hours Per Week – 10 Steps to Win Your Time Back	Value	€197	£167
New Bonus Just Added Bonus 5	Practical AI & Automation Masterclass May – June – July 2025	Value	€1,997	£1,697
Total Combined Bonus Value			€3,488	£2,978

Full Package – If you sign up Before Midnight on Thursday 27th of February

The Accountants' Growth Formula		Value	€1,997	£1,697
Bonus 1	Mastermind Day	Value	€750	£650
Bonus 2	ProfitPro Live 2025	Value	€347	£297
Bonus 3	The Cash Generator Bootcamp	Value	€197	£167
Bonus 4	Finding 3 Hours Per Week – 10 Steps to Win Your Time Back	Value	€197	£167
New Bonus Just Added Bonus 5	Practical AI & Automation Masterclass May – June – July 2025	Value	€1,997	£1,697
Total Combined Value			€5,485	£4,675

Full Package – If you sign up Before Midnight on Thursday 27th of February

The Accountants’ Growth Formula

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Bonus 1	Mastermind Day	Value	€750	£650
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New Bonus Just Added Bonus 5	Practical AI & Automation Masterclass May – June – July 2025	Value	€1,997	£1,697
	Total Combined Value		€5,485	£4,675
Single Pay Enrollment			€497	£447

Full Package – If you sign up Before Midnight on Thursday 27th of February

The Accountants’ Growth Formula

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Multi Pay Option (Pay Today + 2 Monthly Payments) €197 £177

Here is what some of our past Accountants Growth Formula Programme participants have done:

- Raised their prices
- Doubled their profits in 3 years
- Tripled their turnover in 5 Years
- Halved their working hours
- Doubled their annual leave
- Doubled their team
- Fired some team members
- Got other team performing
- Sold their firm for more than double what they started with



Here is what some of our past Accountants Growth Formula Programme participants have done:

- Put a bit of joy and fun back into being an accountancy business owner
- Transformed their client base to only work with ideal clients
- Started attracting more ideal better priced clients
- Sold their firm for more than double what they started with
- Fell in love with their business again
- Gained the confidence to keep moving forward
- Made decisions and took the necessary actions to win their lives back
- Put a bit of joy and fun back into being an accountancy business owner
- Prepared their firm for exit



Risk Free - Money Back Guarantee

- Money back Guarantee
- 30 Days in - If you don't believe the programme is worth the value of your investment
- If you can not apply it to generate at least the value of your investment.
- Money back no questions asked
- Up to 27th of March



You Don't have to do it all on Your Own

- Bring your partner
- Bring your director
- Bring your manager
- Bring your spouse
- Bring your senior
- Bring your practice manager
- Bring your partner designate
- Bring the person or people that are going to get you the result you want
- Just sign up and request your unique 2nd Person Discount Code



Full Package – If you sign up Before Midnight on Thursday 27th of February

The Accountants’ Growth Formula

		Value	€1,997	£1,697
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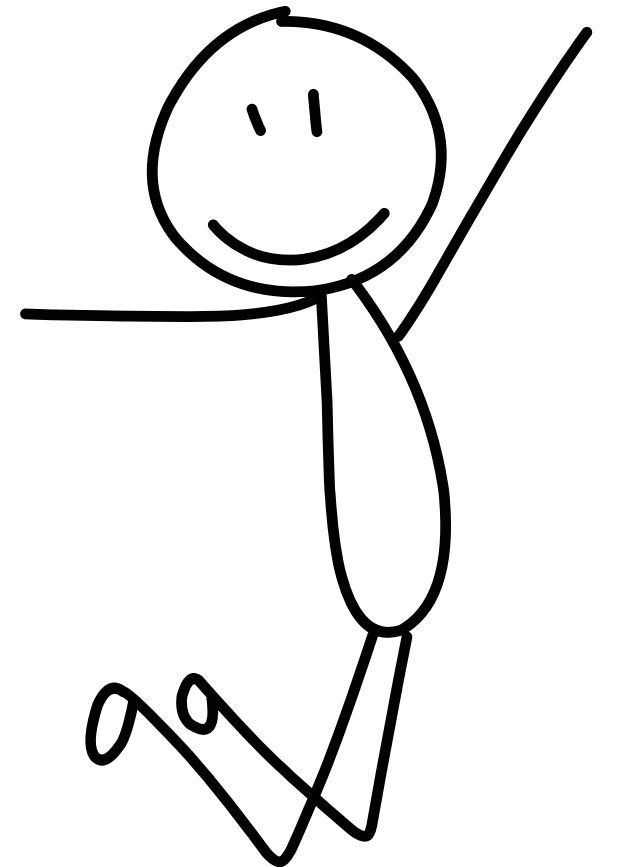
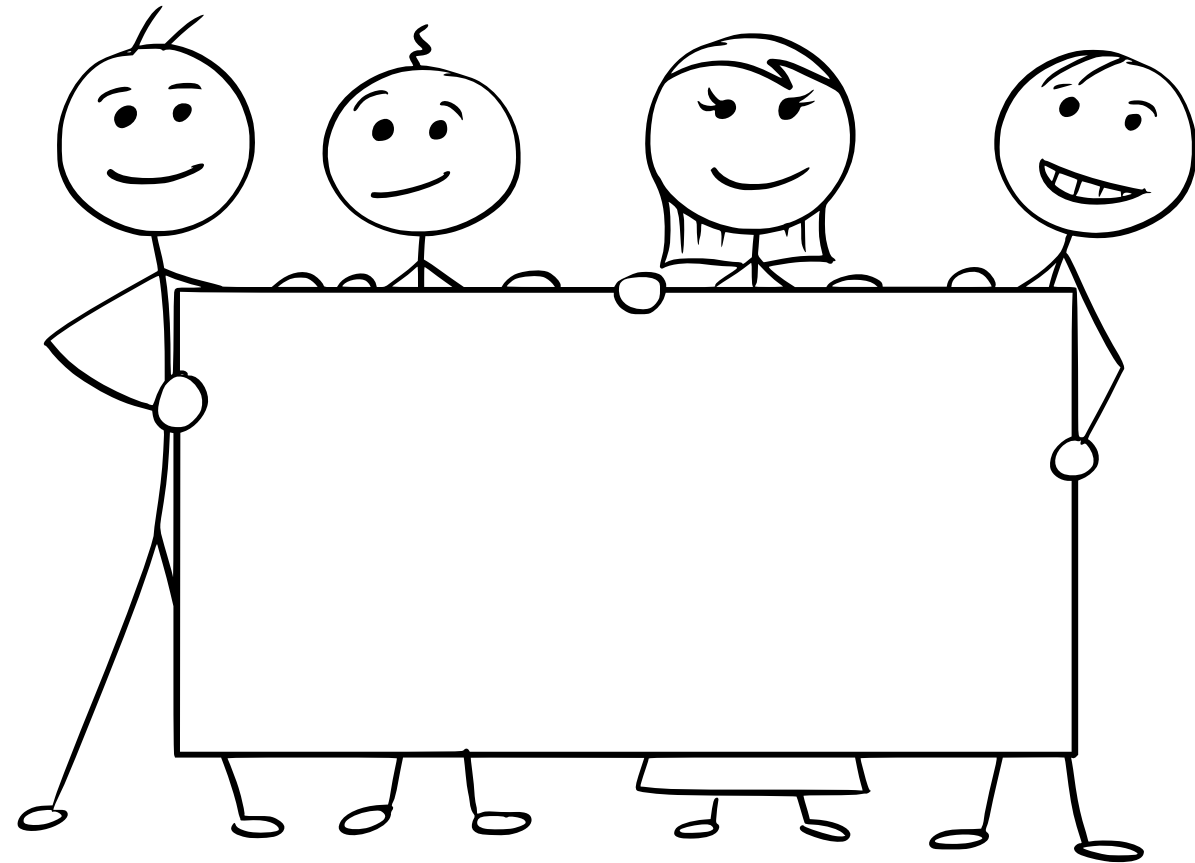
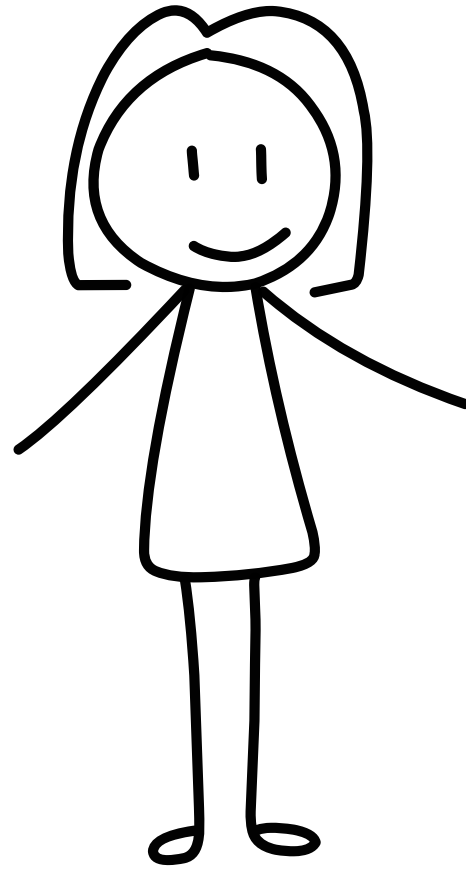
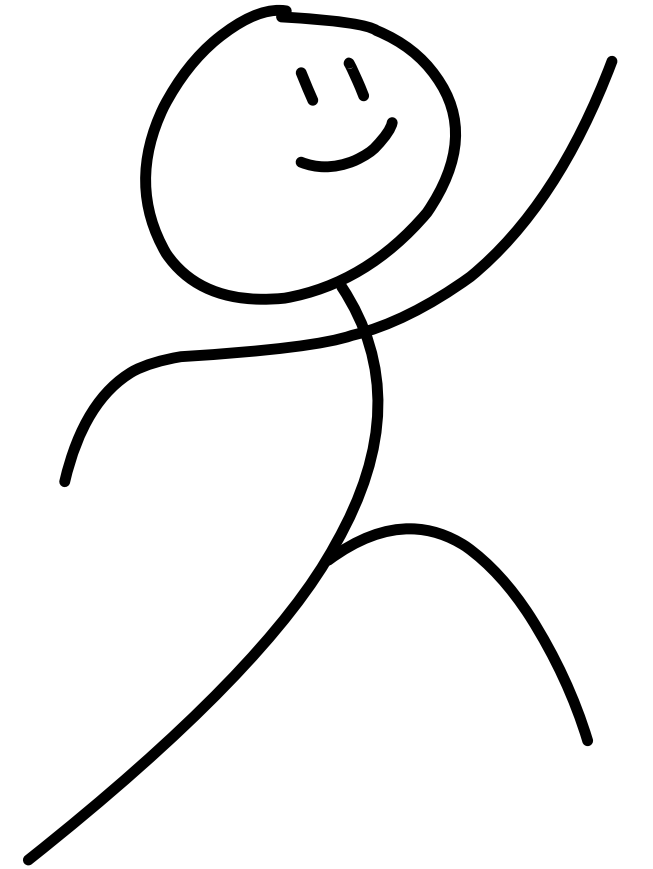
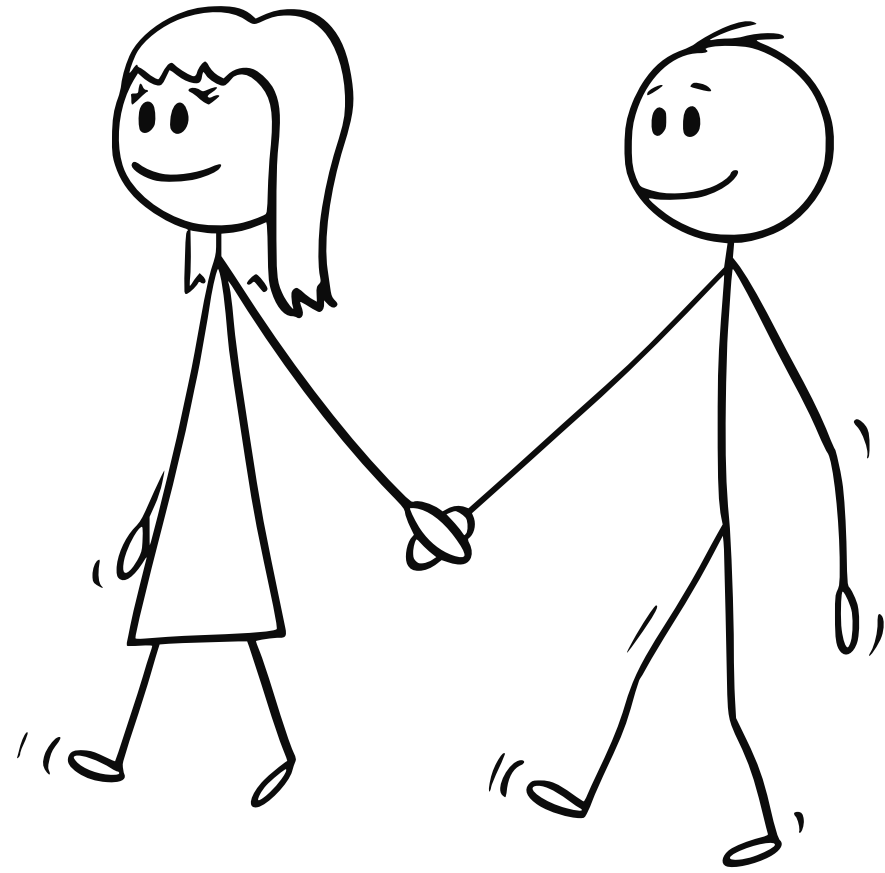
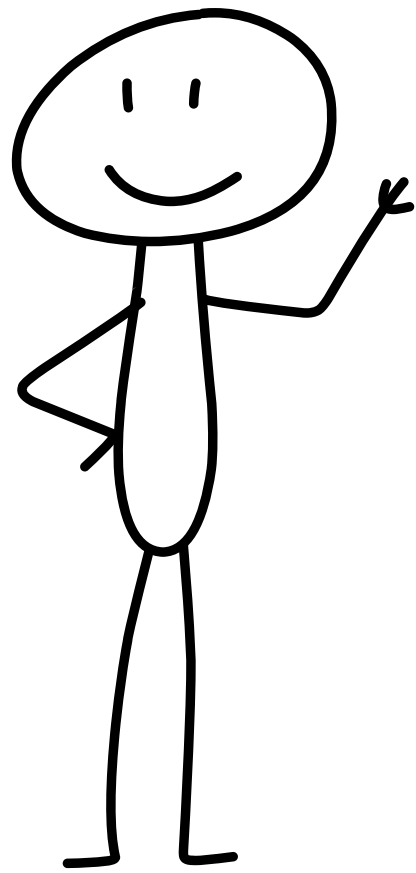
For Firm Owners who are Action Orientated

- Buy Today
- 90 Minute Live Strategy Activator Session
- Rapid Implementation of 6 Step Success Path
- Create your Firms Strategy
- Shift The Mindset
- Believe
- Take Action
- Also Get Bonus Strategy Activator Session as Part of **Practical AI & Automation Masterclass**

ACTION
CHANGES
THINGS



TAKE
THE FIRST
STEP



ProfitPro

Practice Benchmarking Analysis 2025

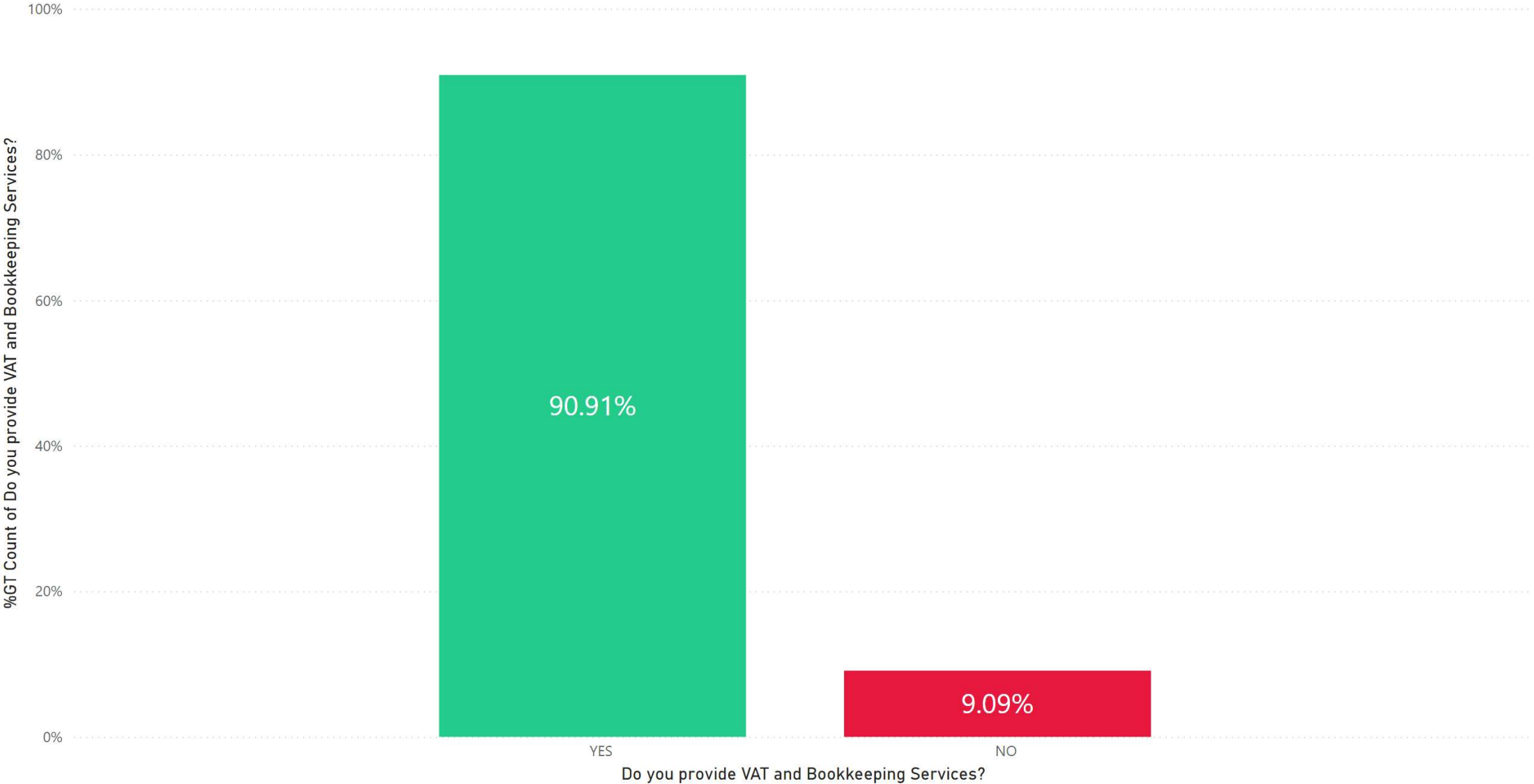
Draft V1 Feb

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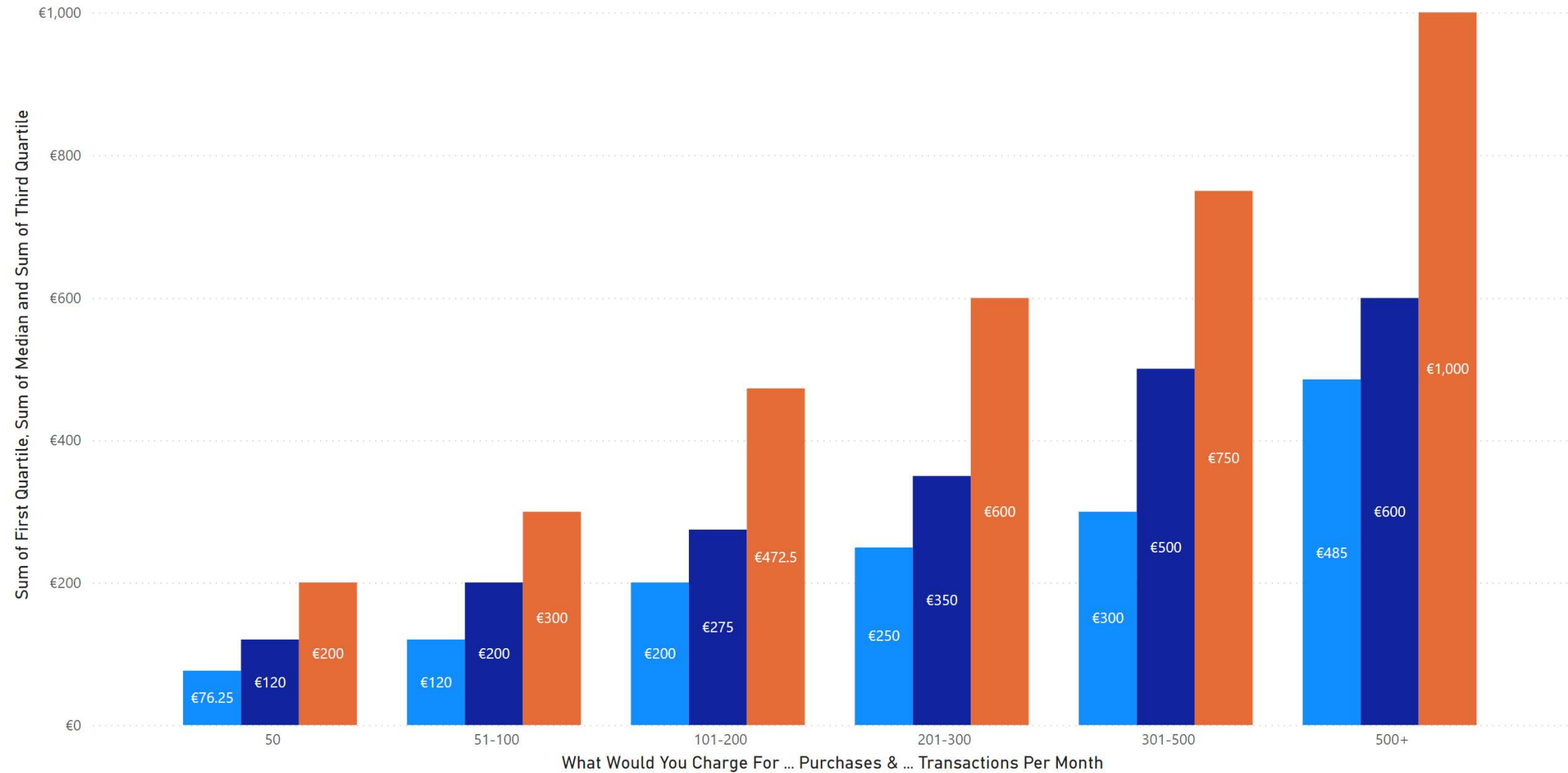
Do You Provide VAT And Bookkeeping Services?

Do you provide VAT and Bookkeeping Services? ● YES ● NO



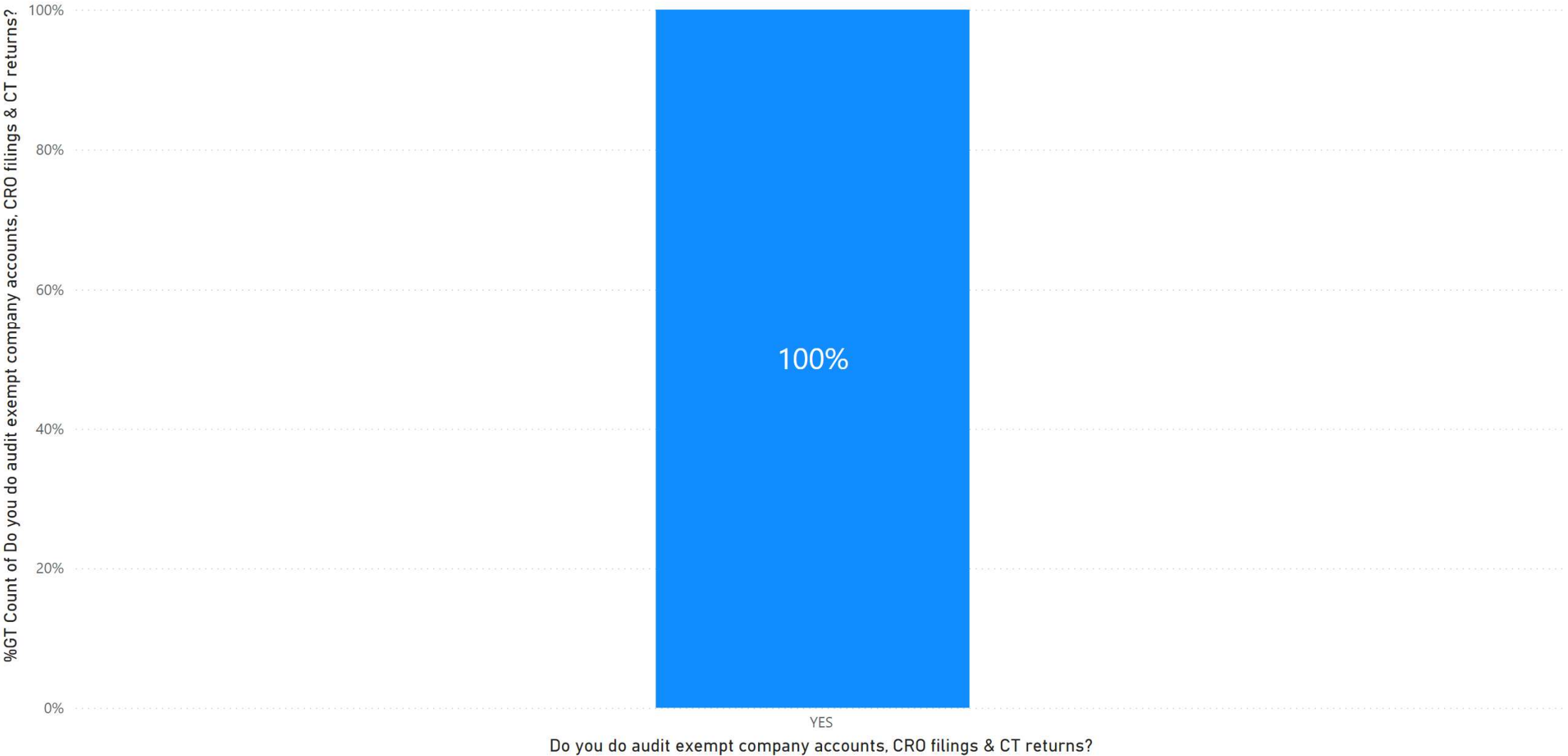
What Would You Charge For ... Purchases & ... Transactions Per Month? - Median

Sum of First Quartile Sum of Median Sum of Third Quartile



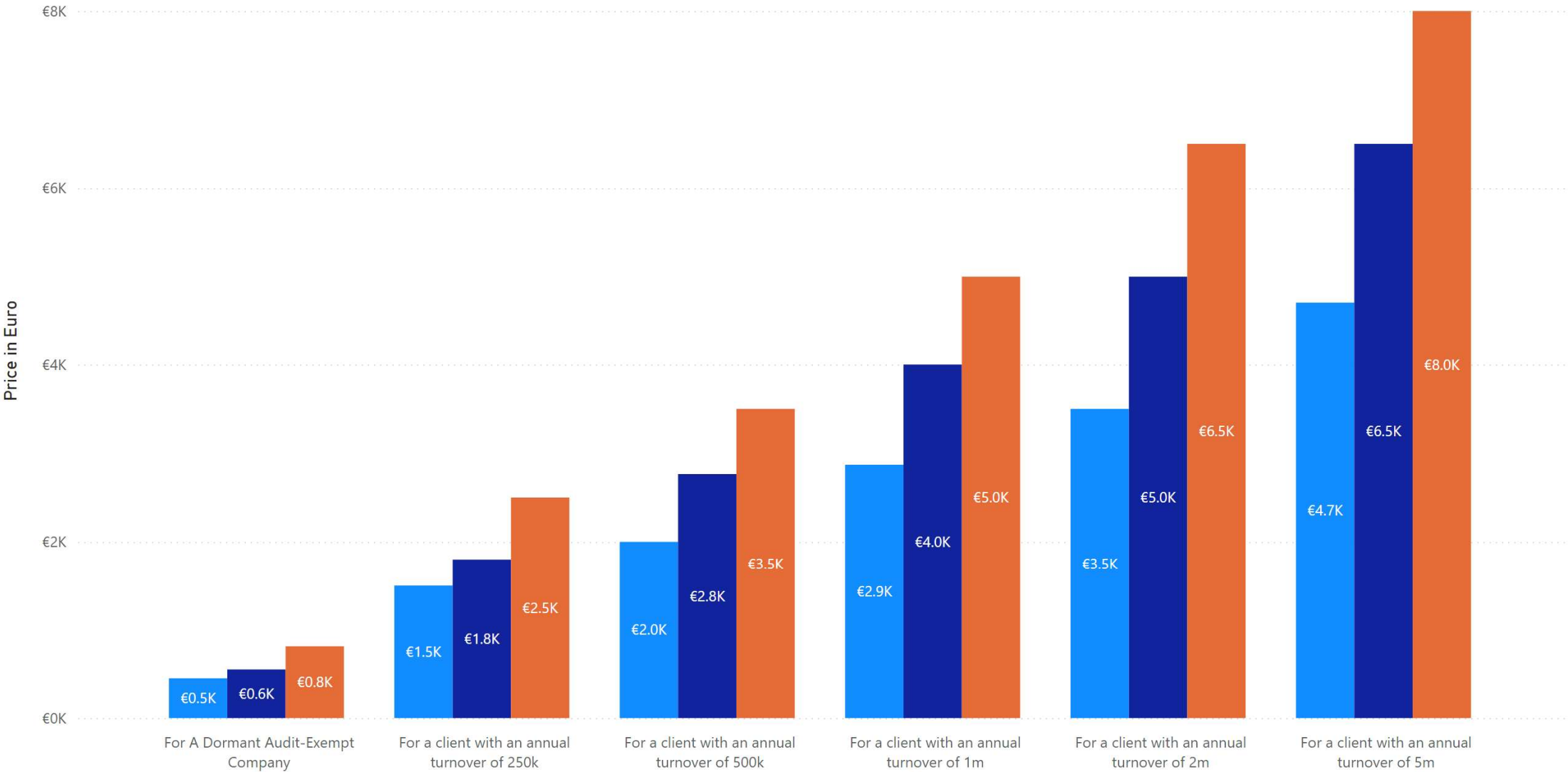
Do You Do Audit Exempt Company Accounts, CRO Filings & CT Returns?

Do you do audit exempt company accounts, CRO filings & CT returns? ● YES



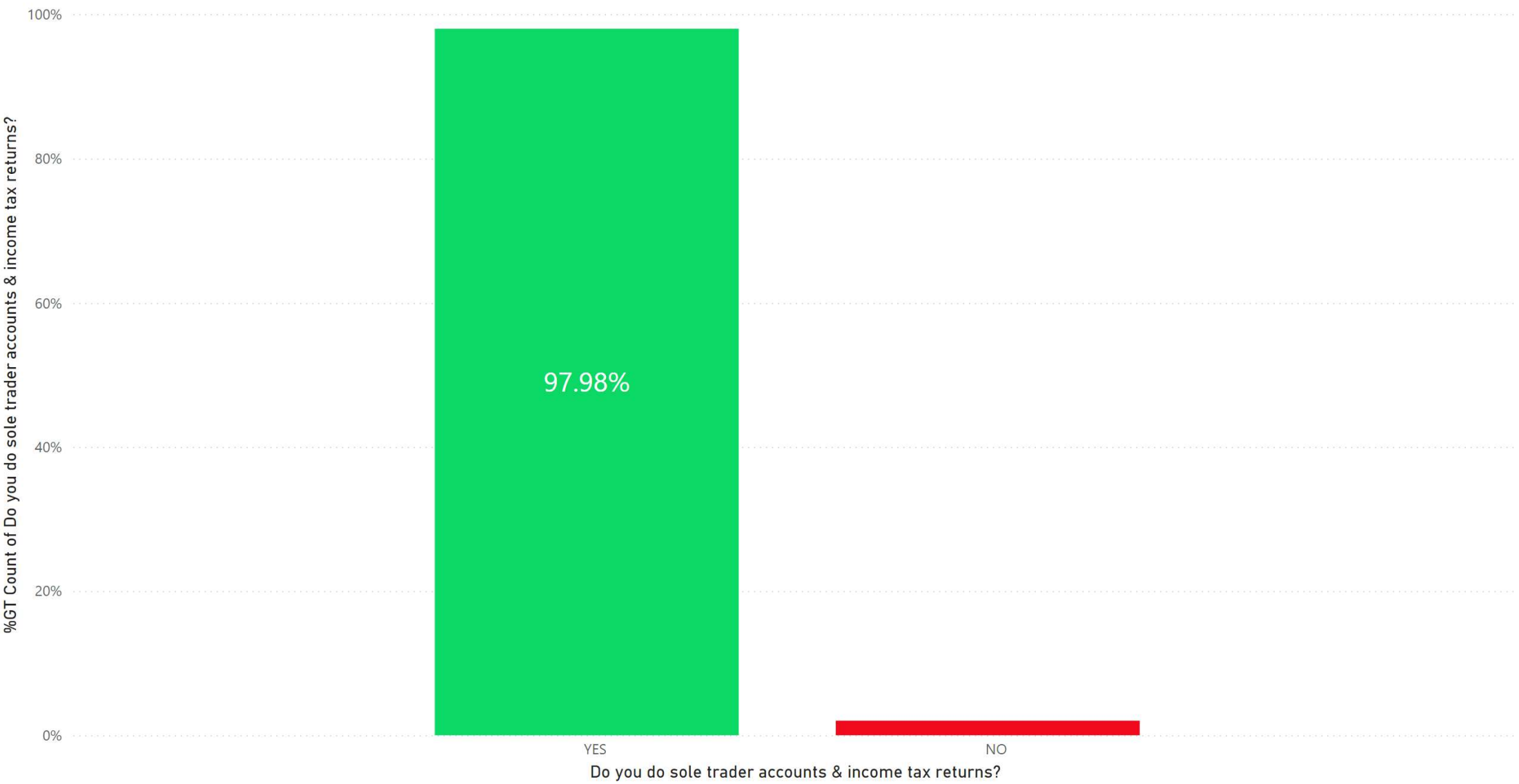
What Would You Charge Annually To Do Audit-Exempt Accounts, CRO Filings & CT Returns?

Sum of First Q Sum of Median Sum of Third Q



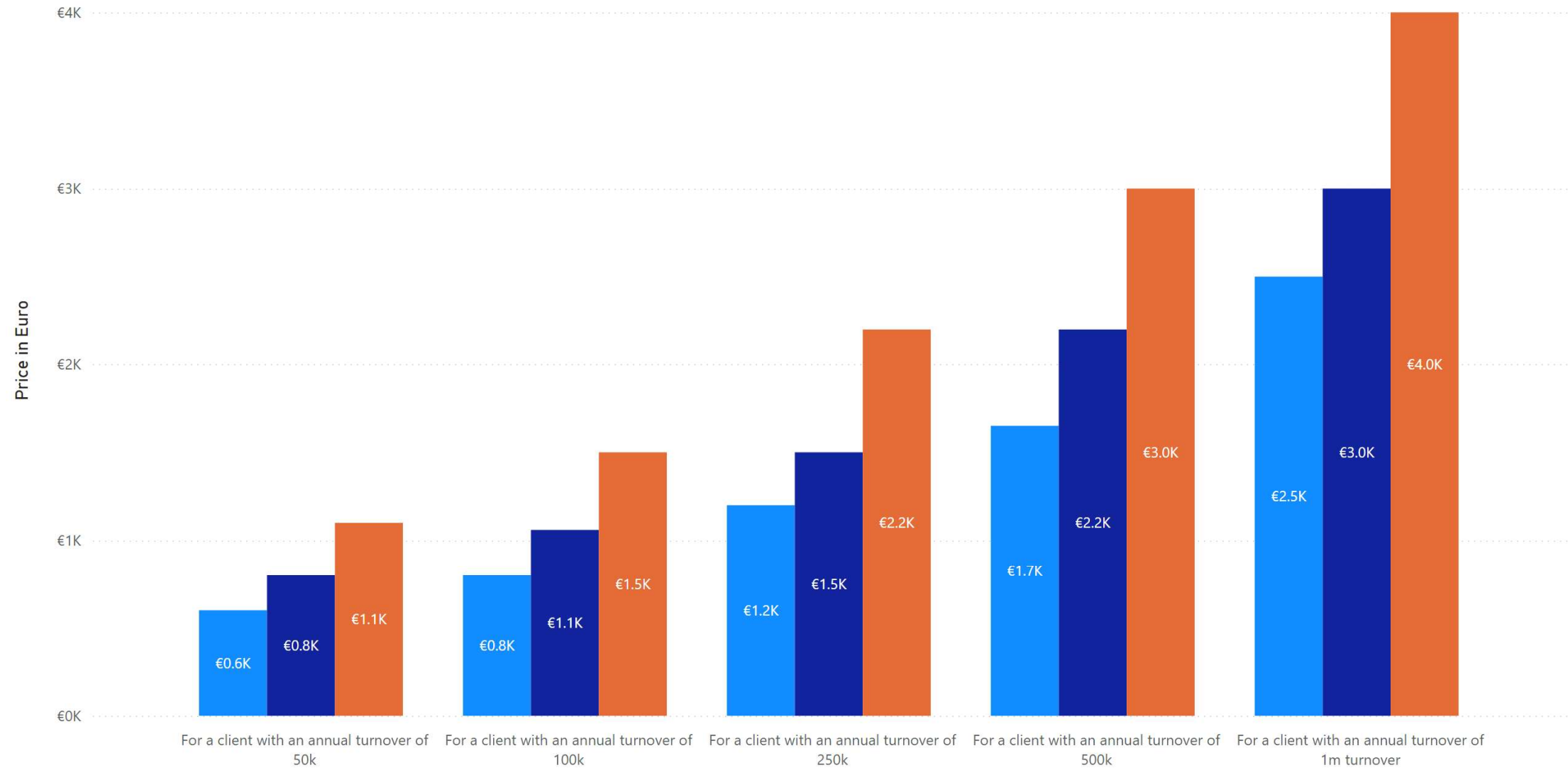
Do You Do Sole Trader Accounts & Income Tax Returns?

Do you do sole trader accounts & income tax returns? ● YES ● NO



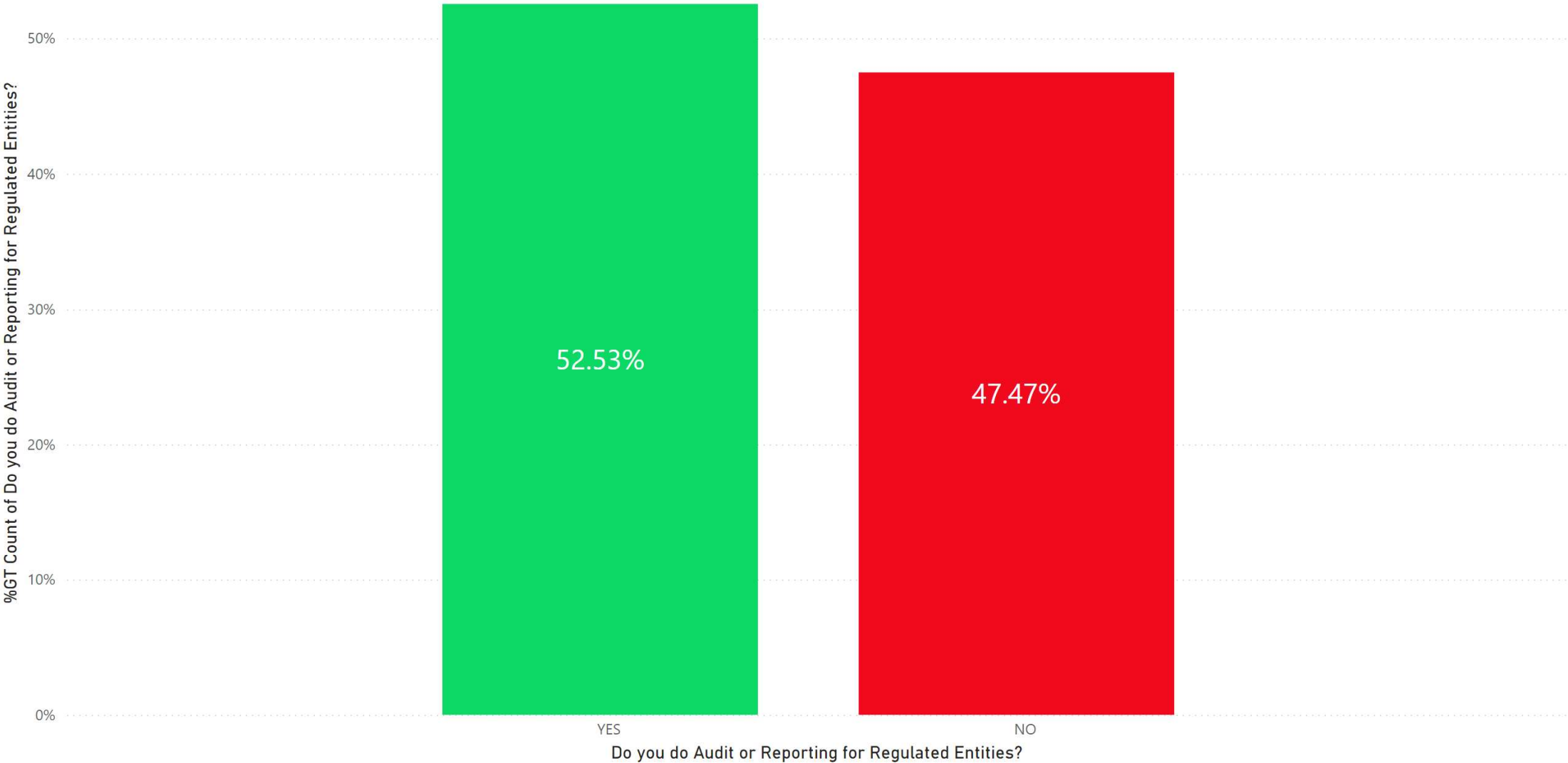
What Would You Charge Annually To Do Sole Trader Accounts And Income Tax Returns?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



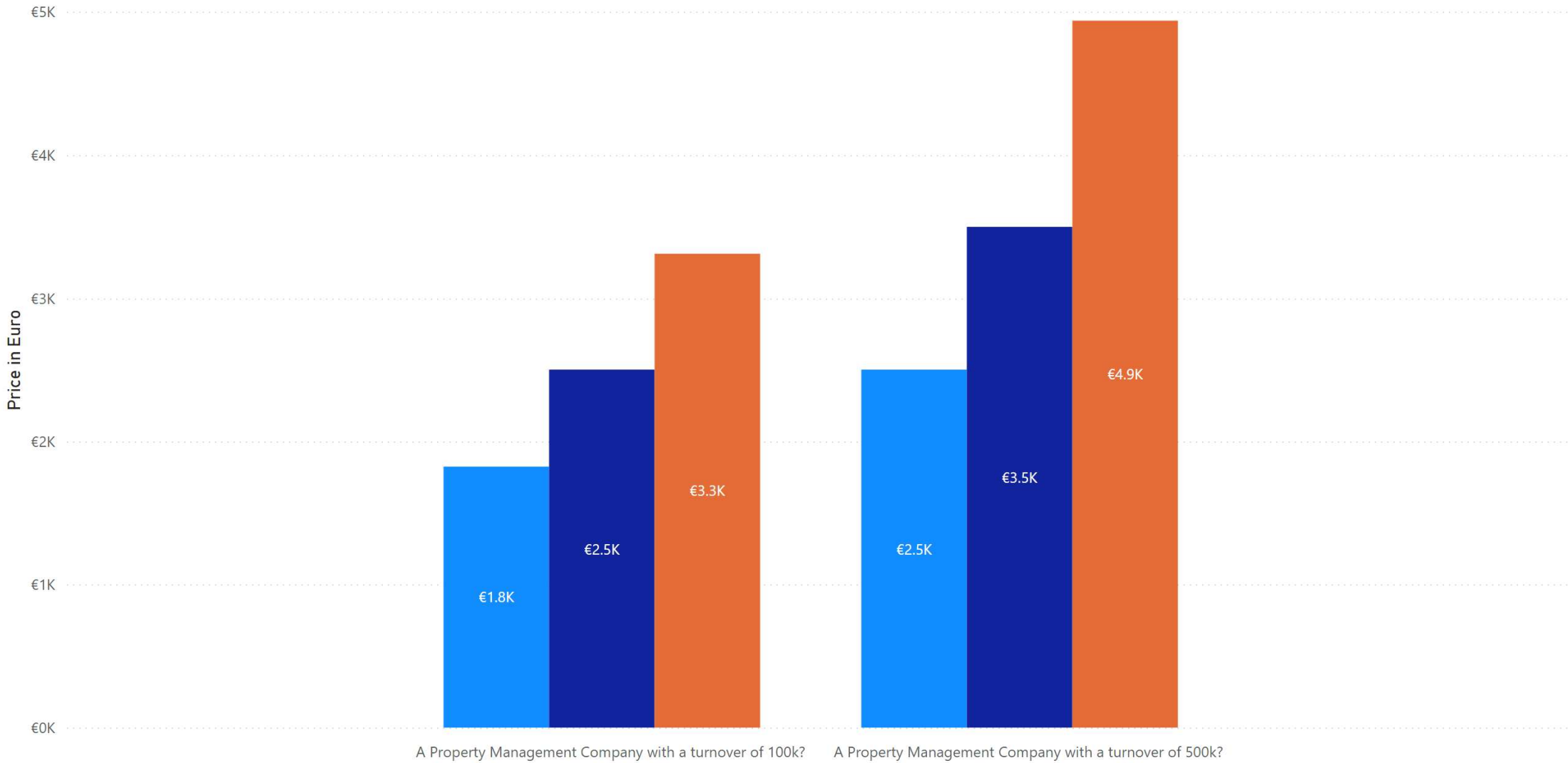
Do you do Audit or Reporting for Regulated Entities?

Do you do Audit or Reporting for Regulated Entities? YES NO



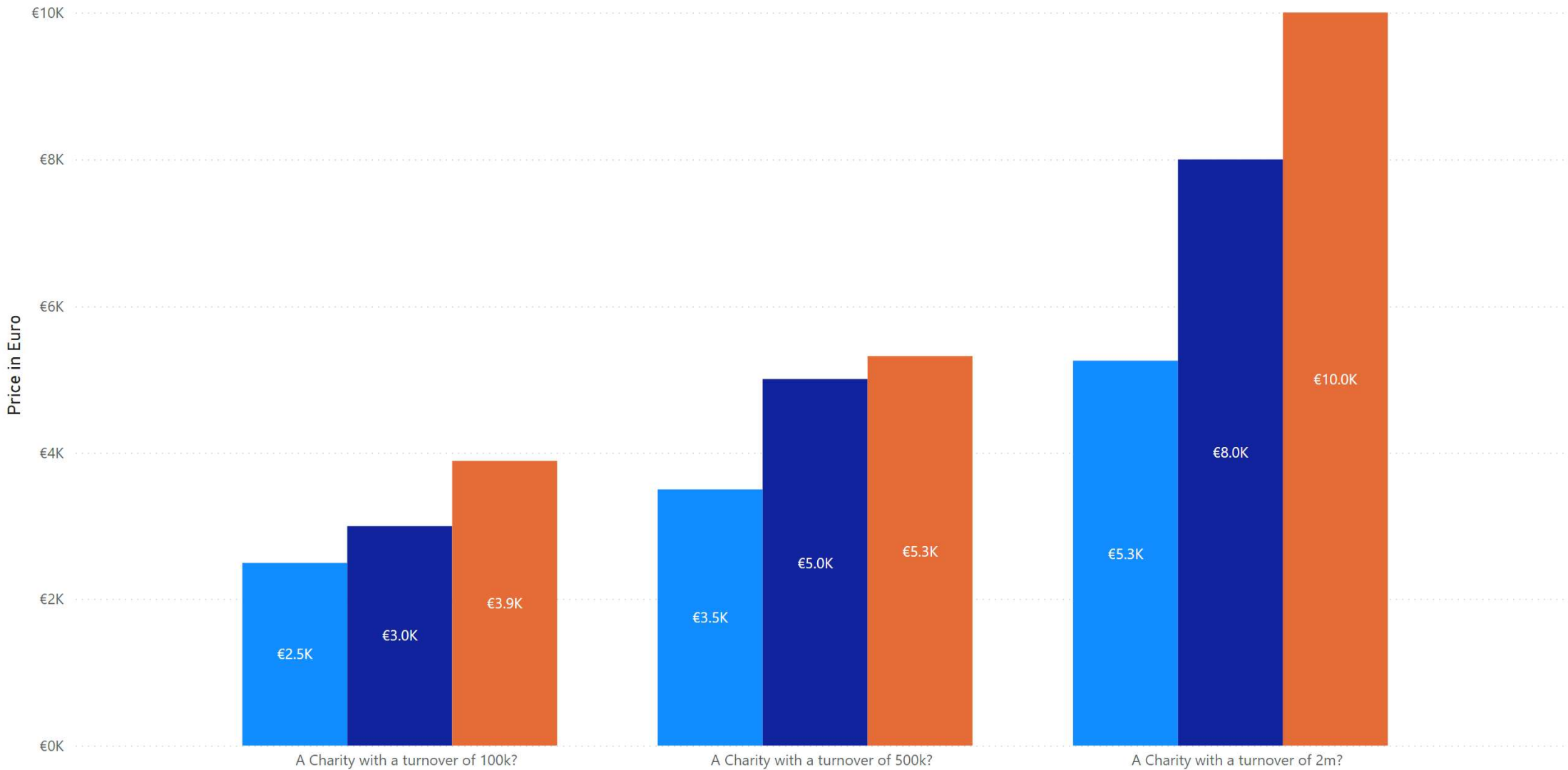
What Would You Charge Annually To Do Audit & Reporting For?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



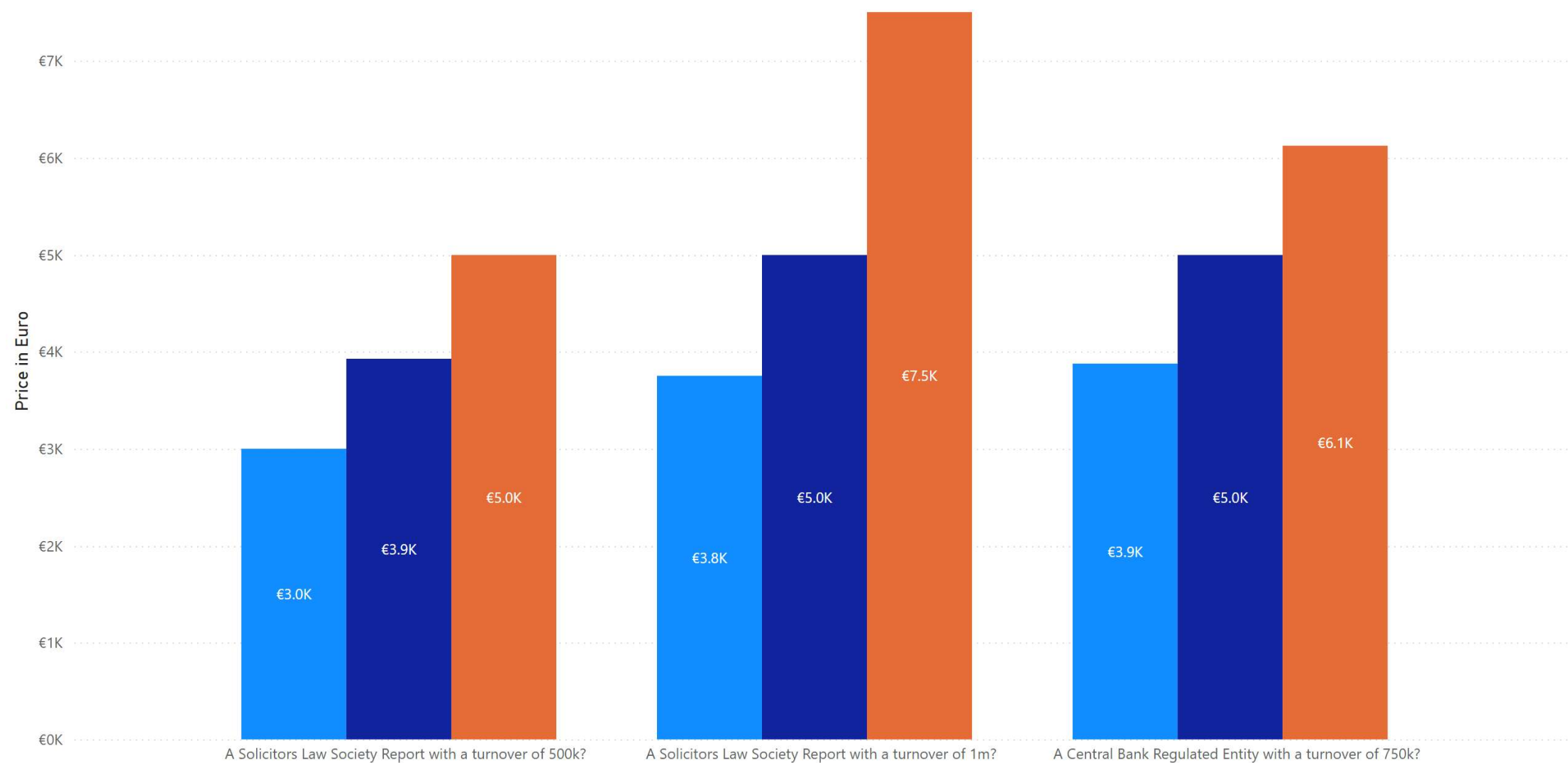
What Would You Charge Annually To Do Audit & Reporting For?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



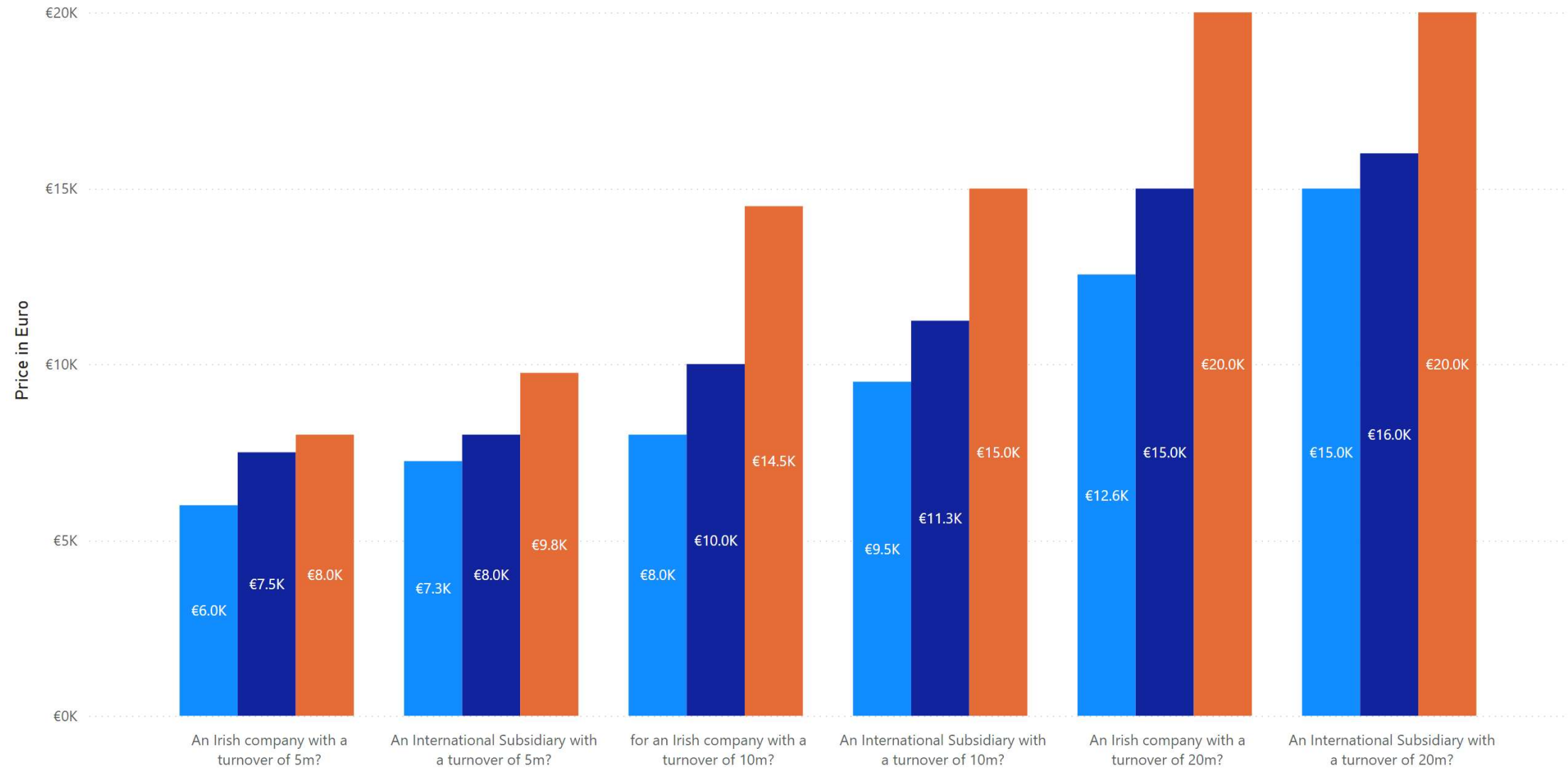
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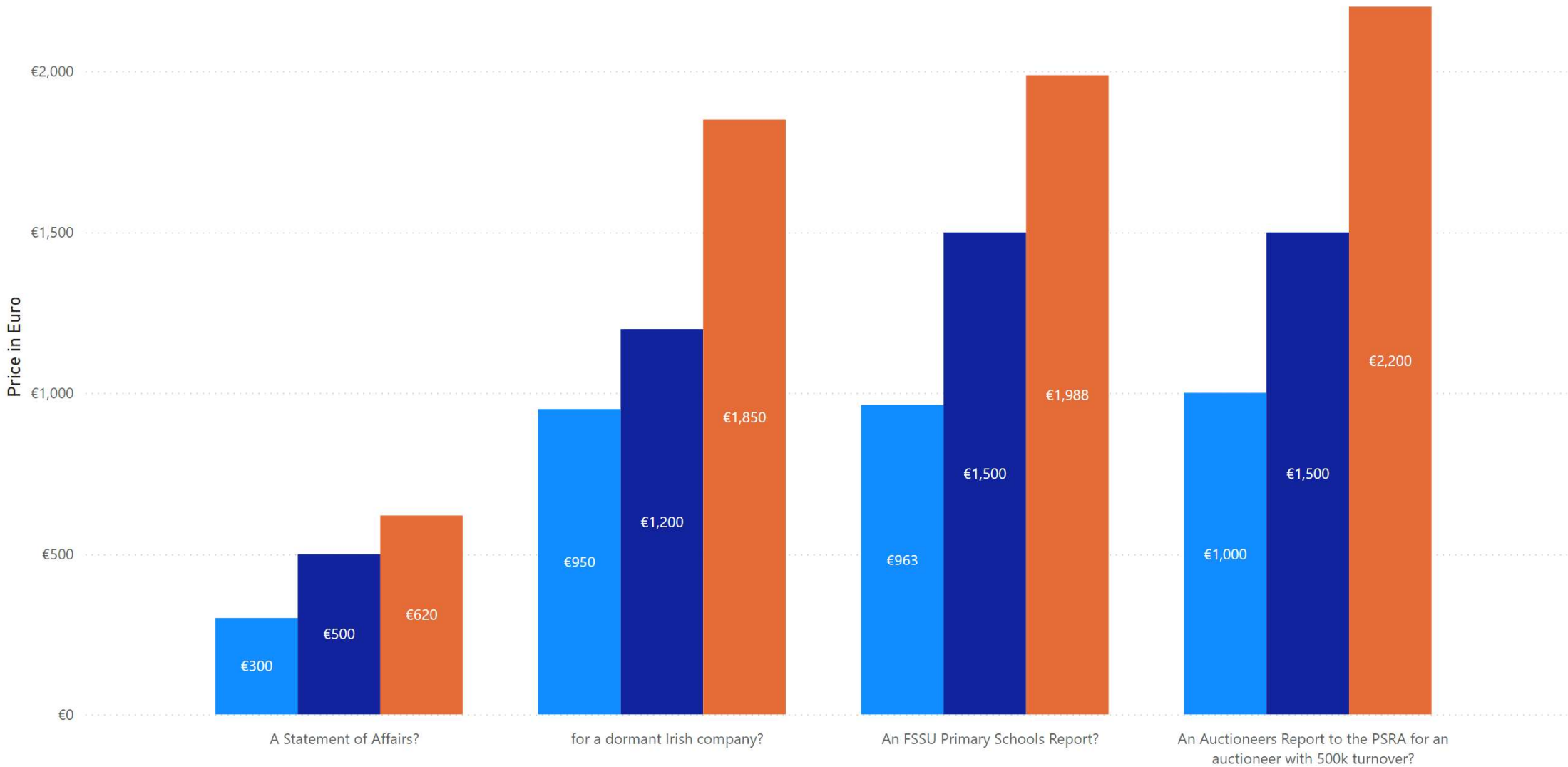
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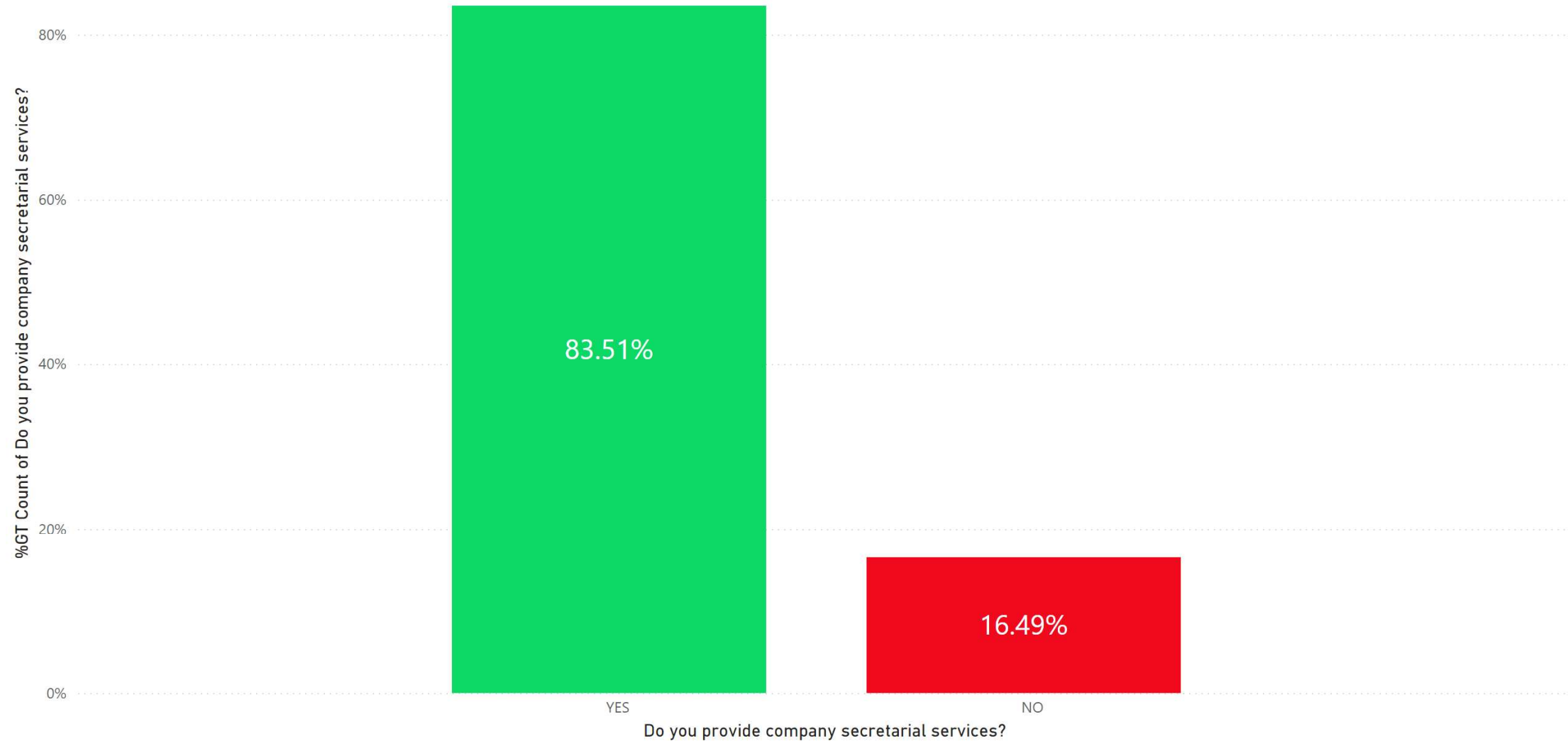
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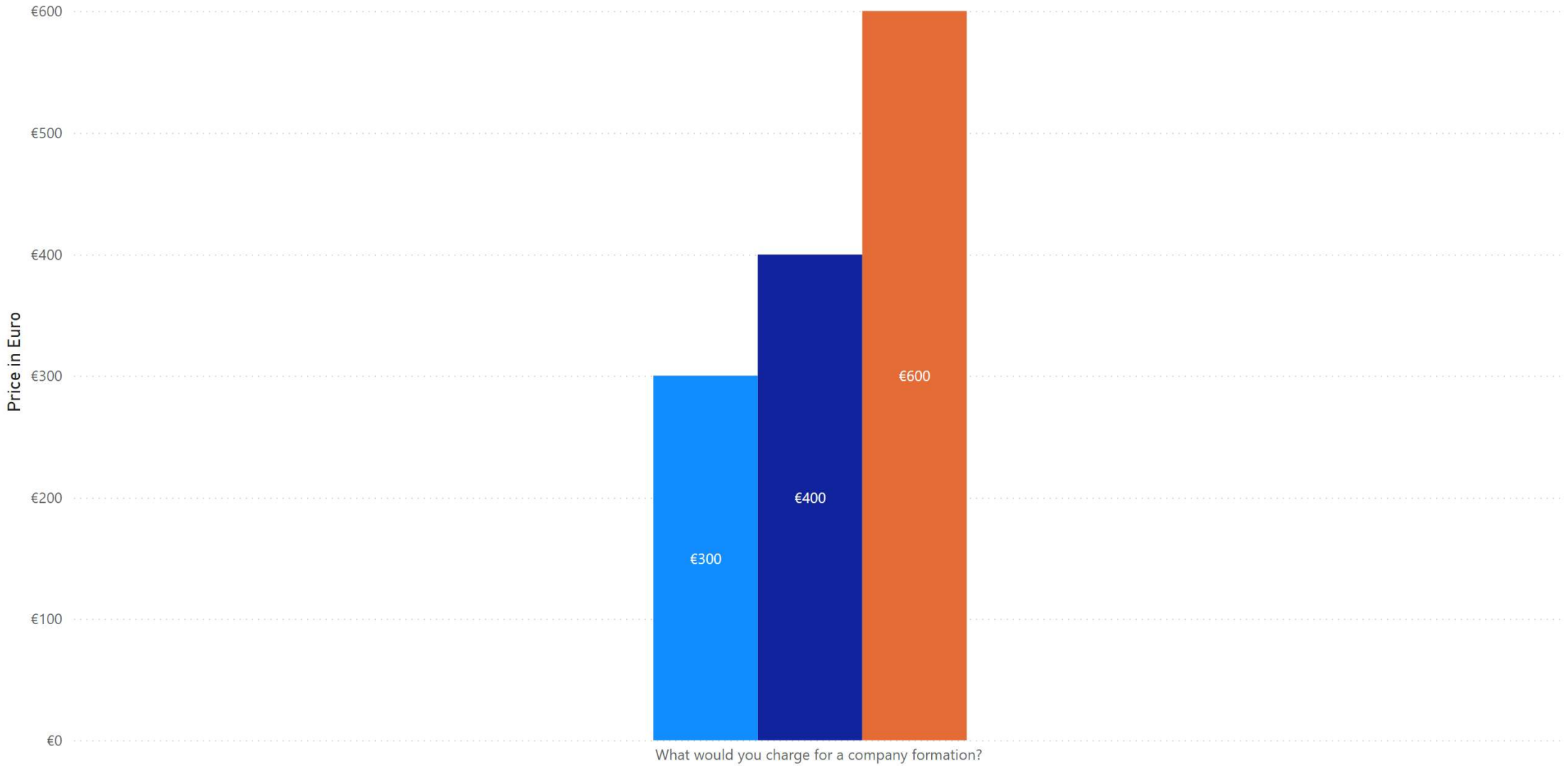
Do You Provide Company Secretarial Services?

Do you provide company secretarial services? ● YES ● NO



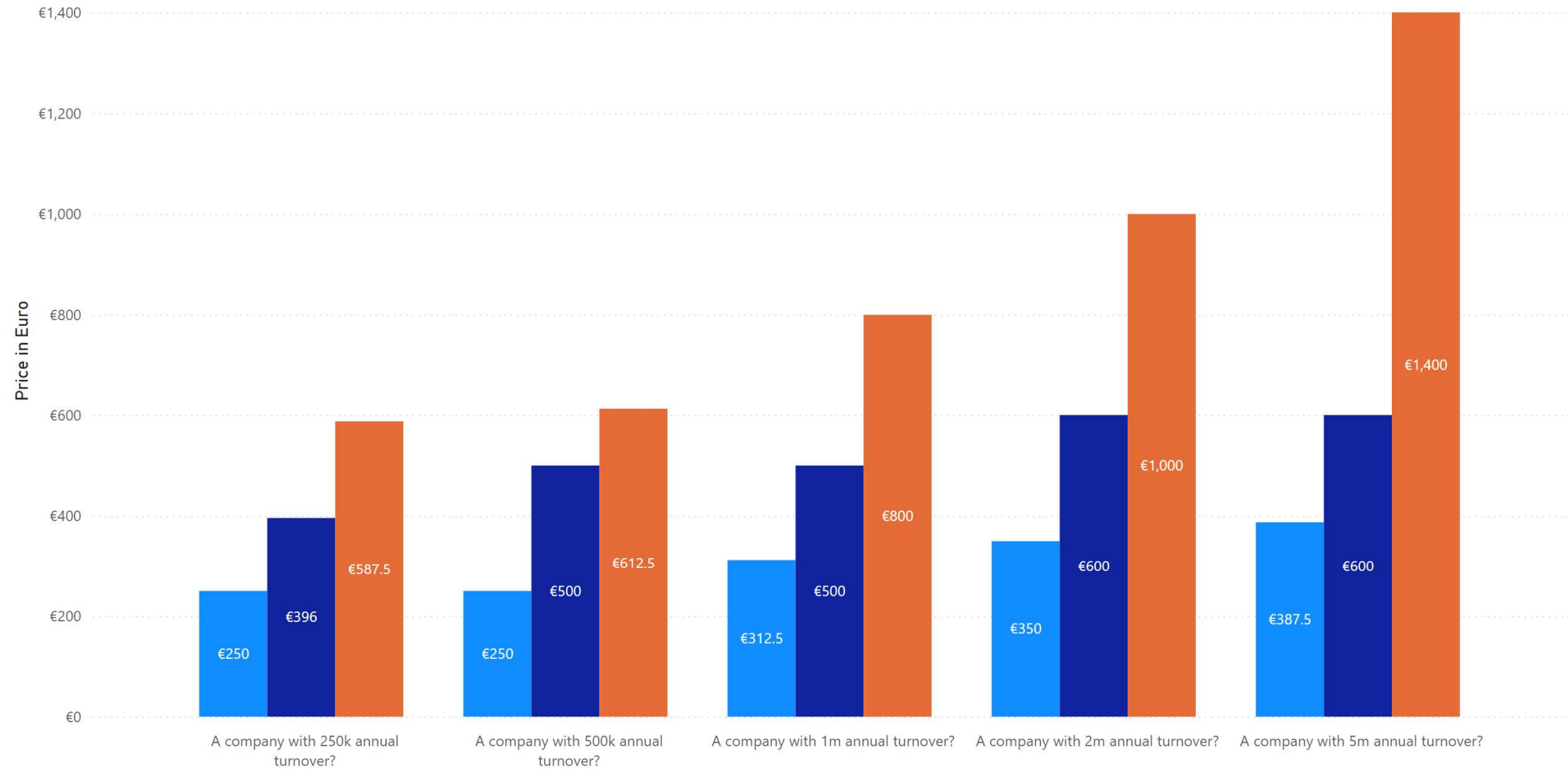
What Would You Charge To Do A Company Formation?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



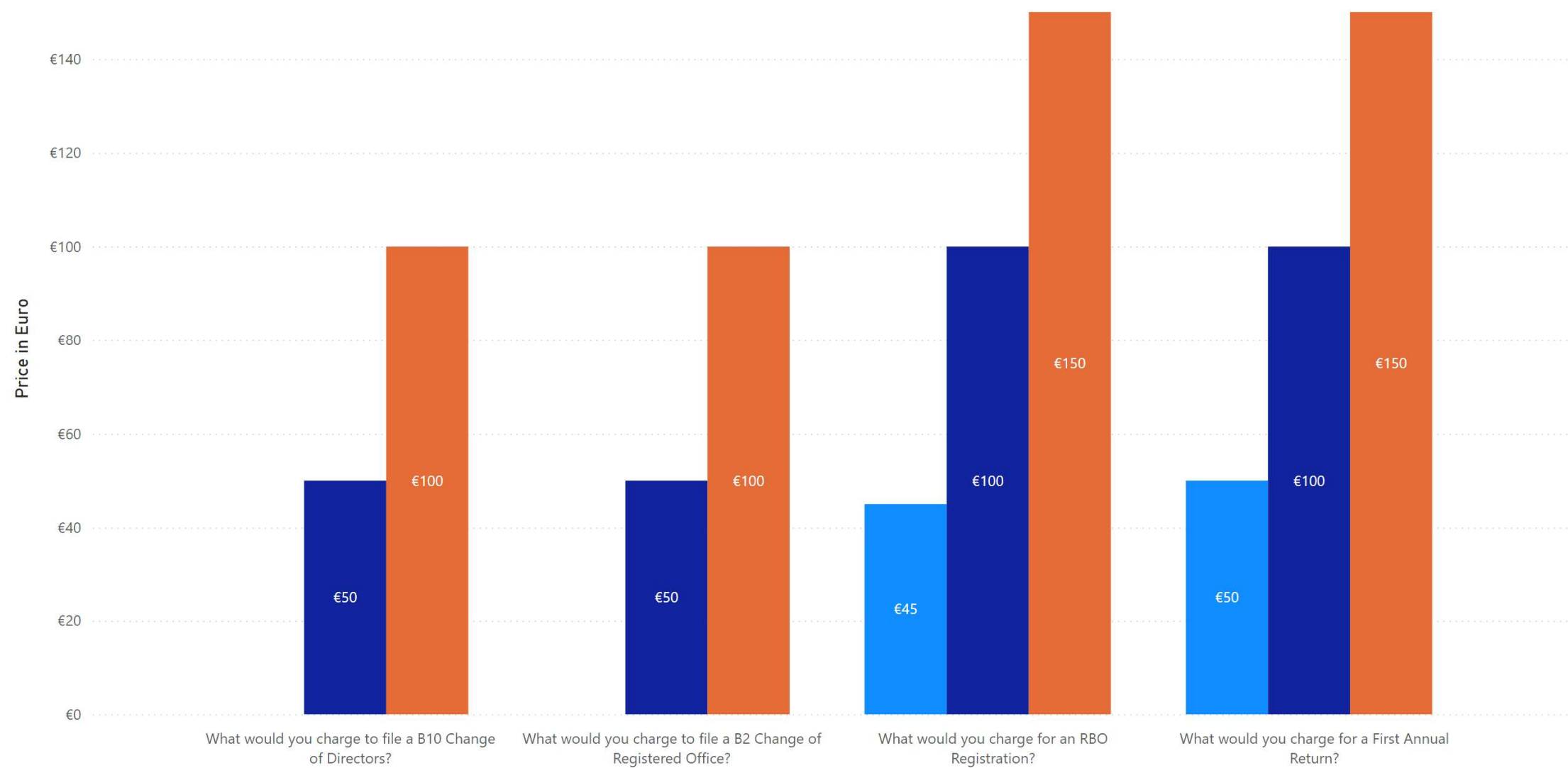
What Would You Charge Annually To Do A Company Annual Return, Abridged Accounts & AGM Pack For?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



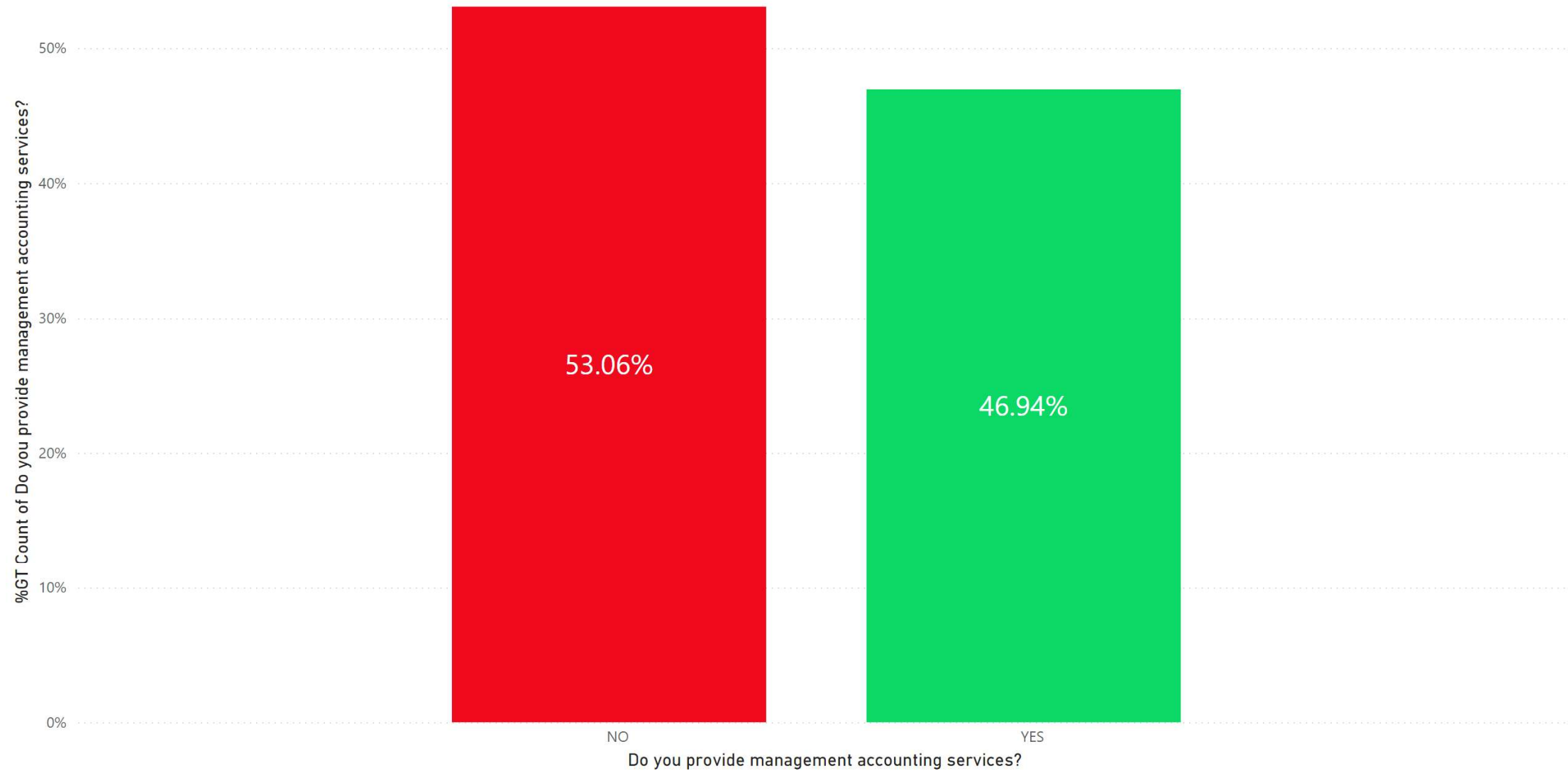
Company Secretarial Continued

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



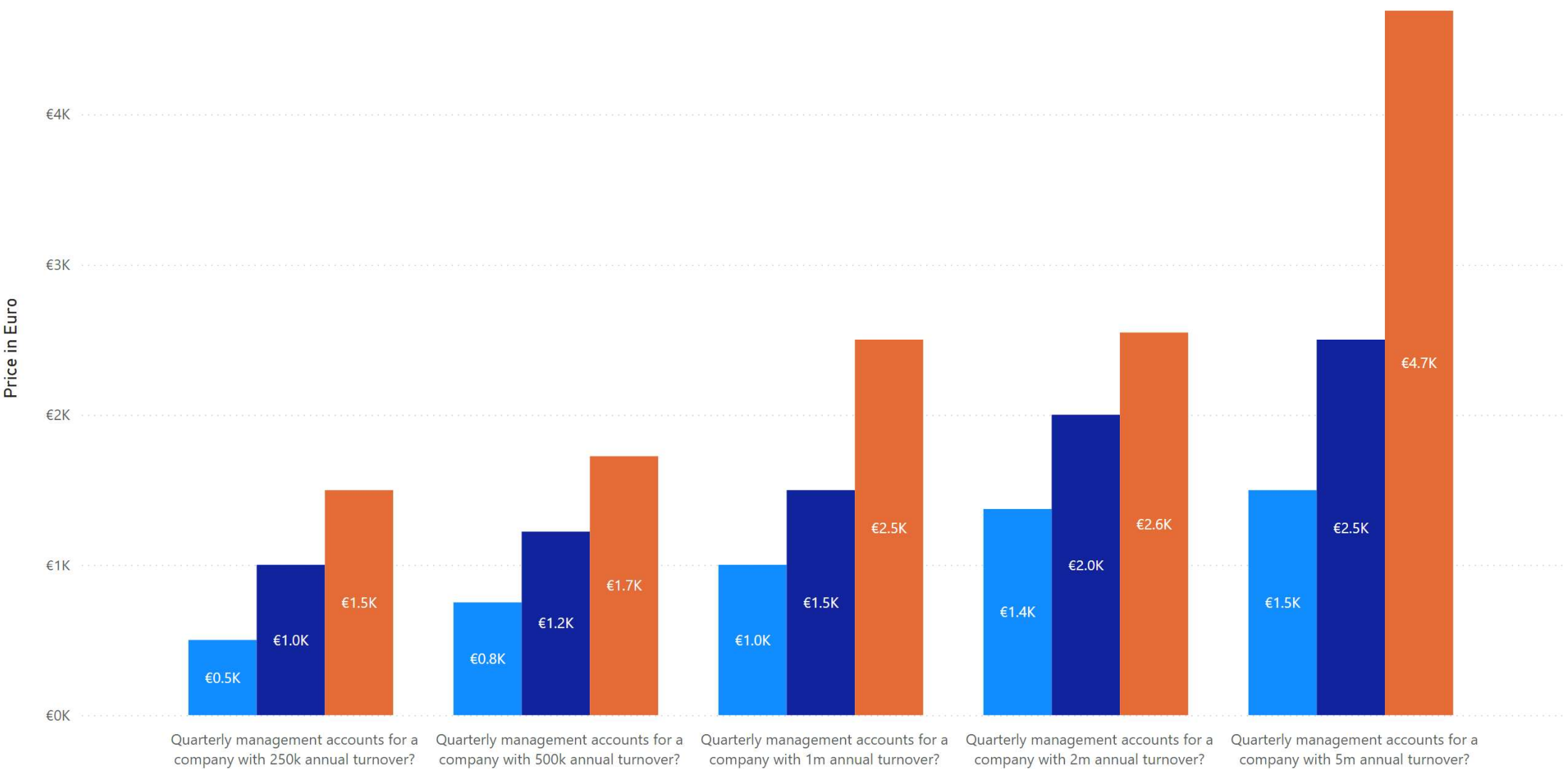
Do You Provide Management Accounting Services?

Do you provide management accounting services? ● NO ● YES



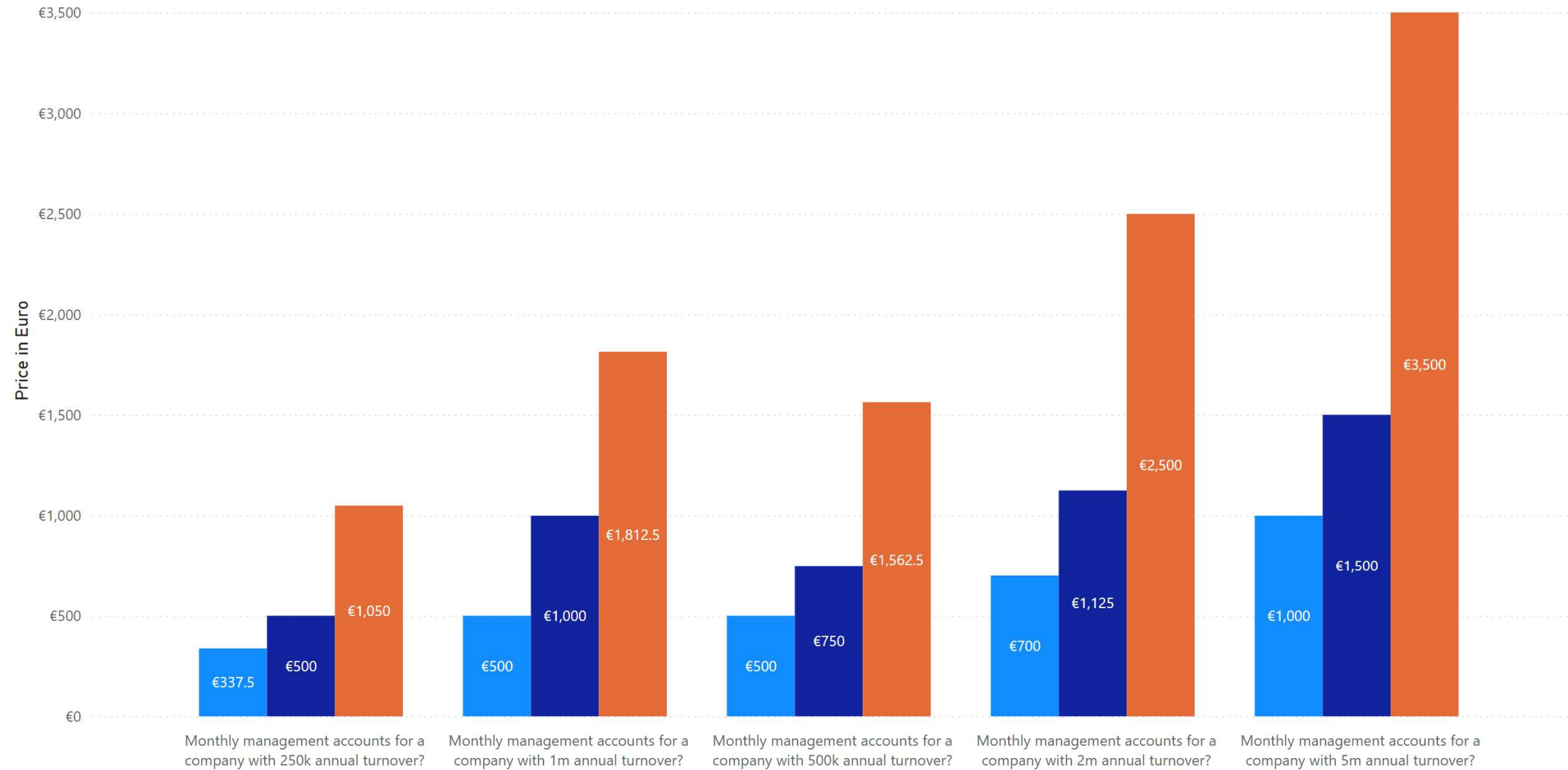
Quarterly Management Accounting Prices

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



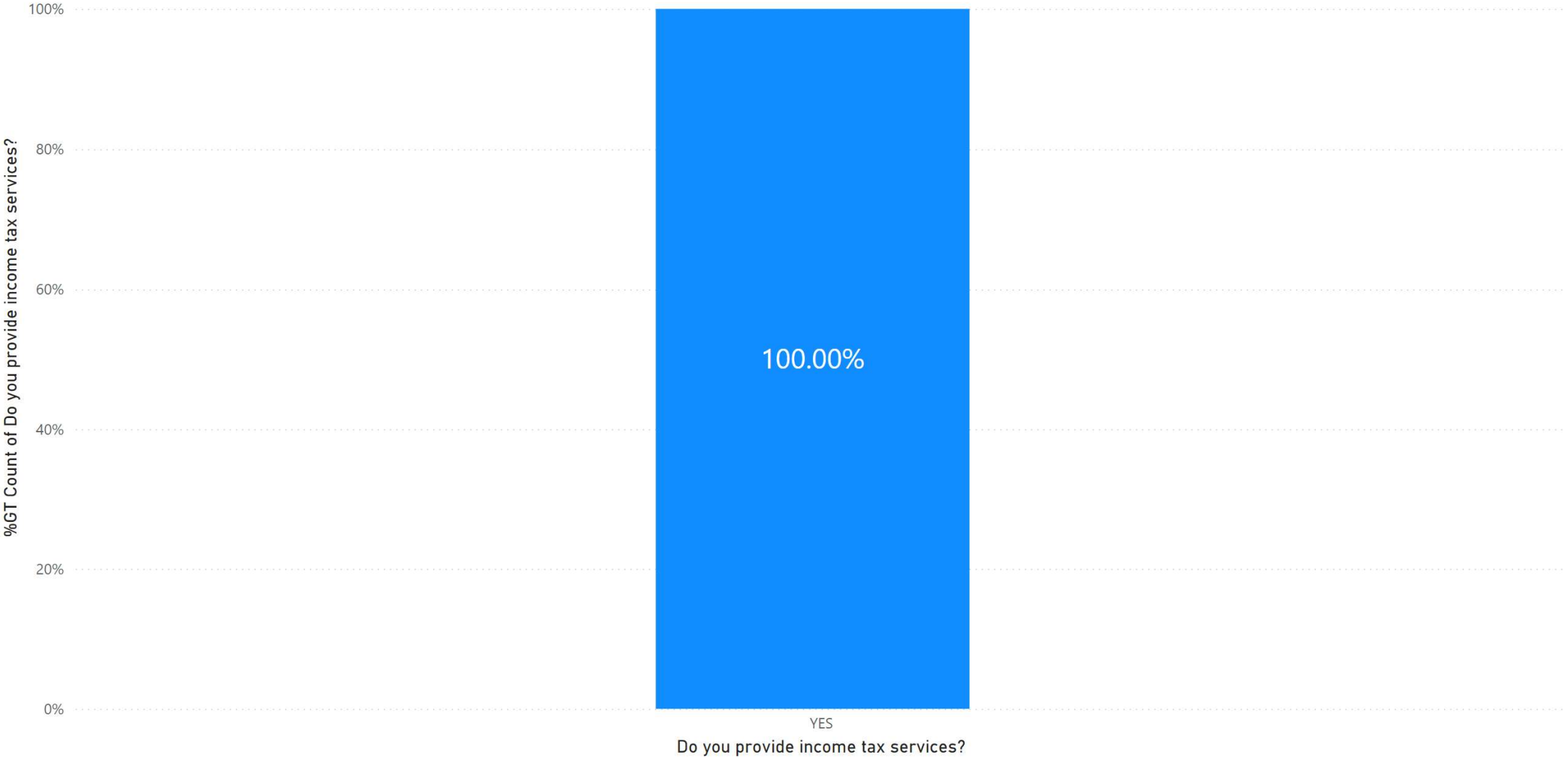
Monthly Management Accounting Prices

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



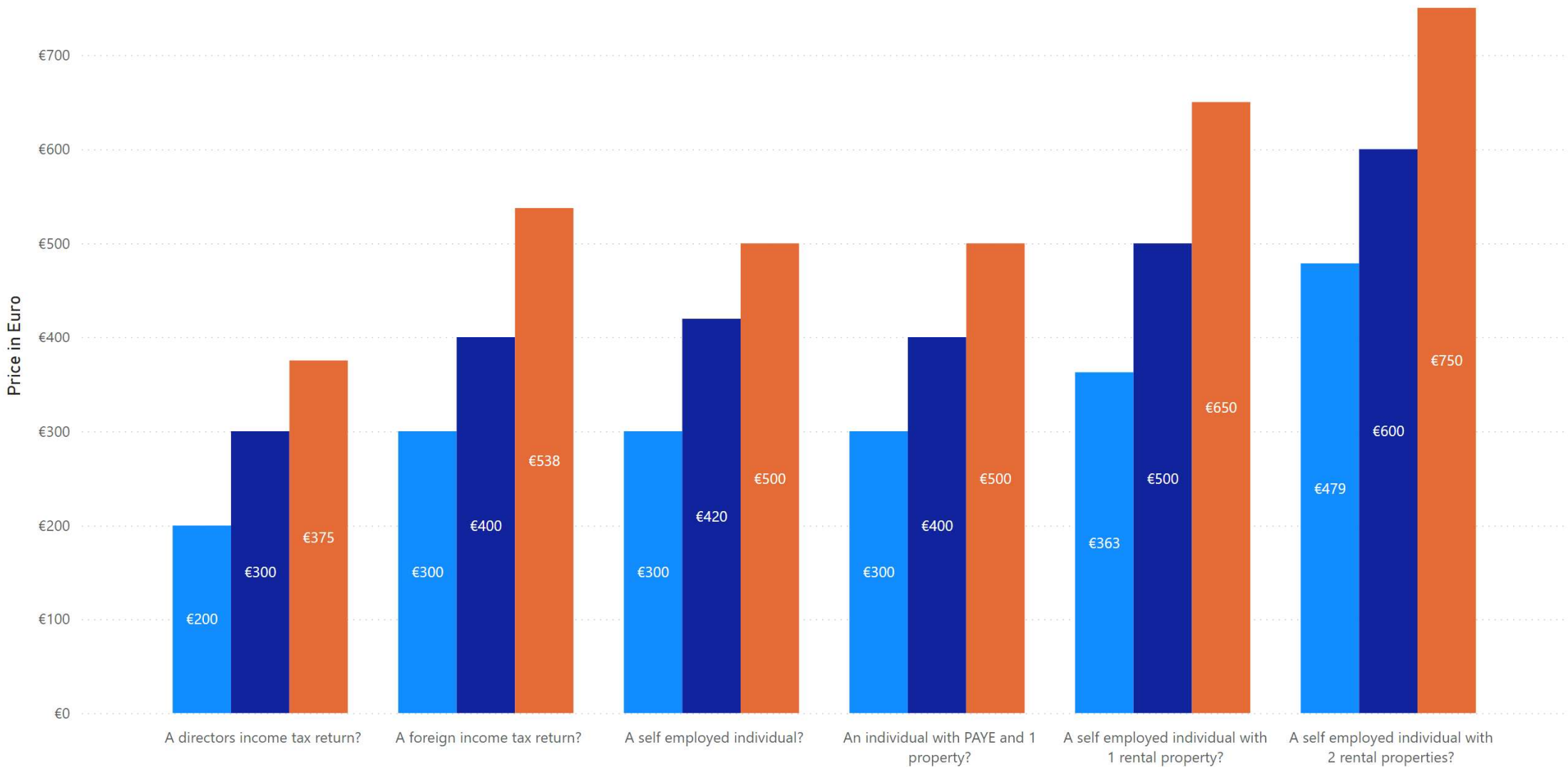
Do You Provide Income Tax Services?

Do you provide income tax services? ● YES



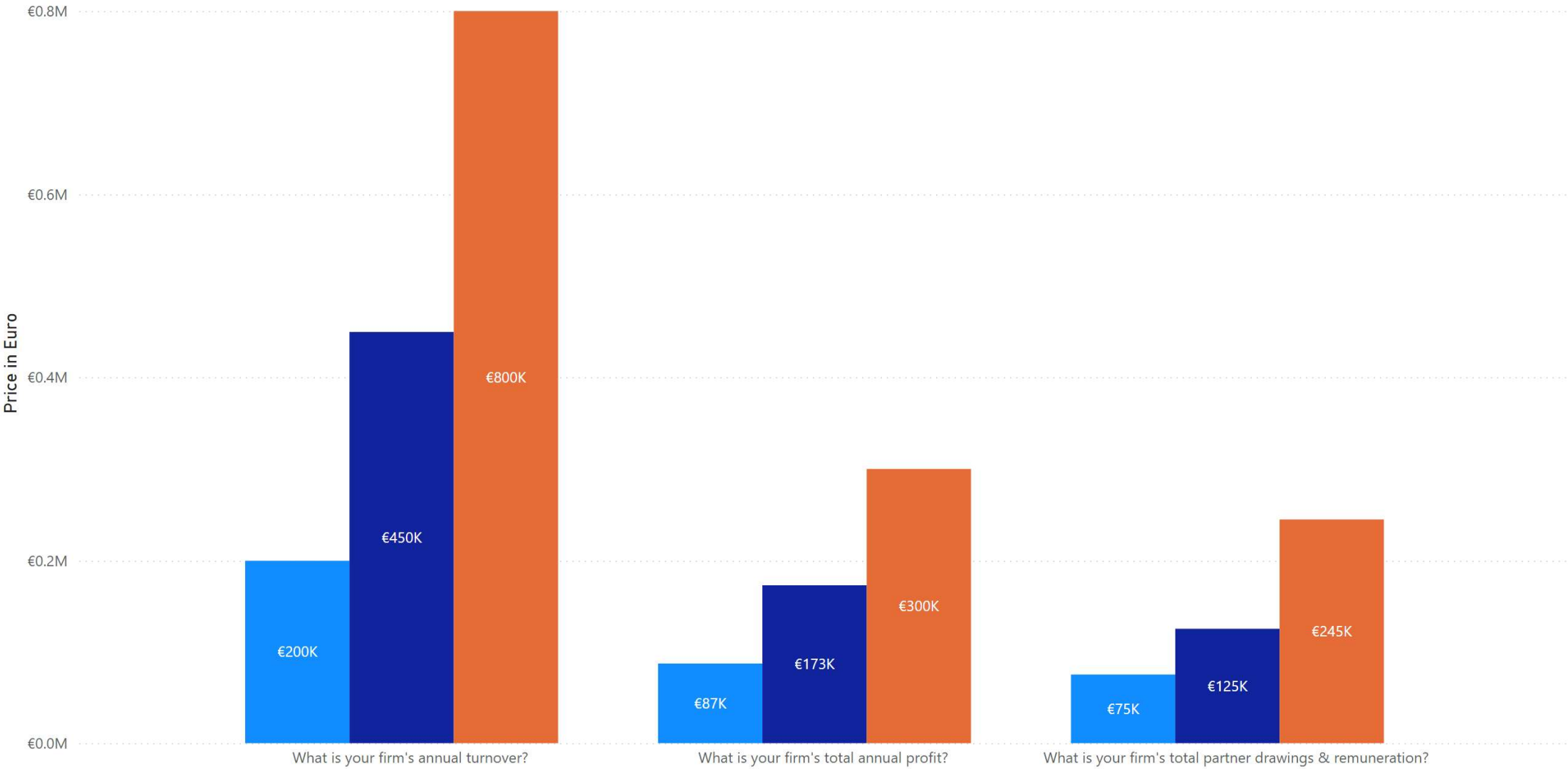
What Would You Charge Annually To Do An Income Tax Return For?

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



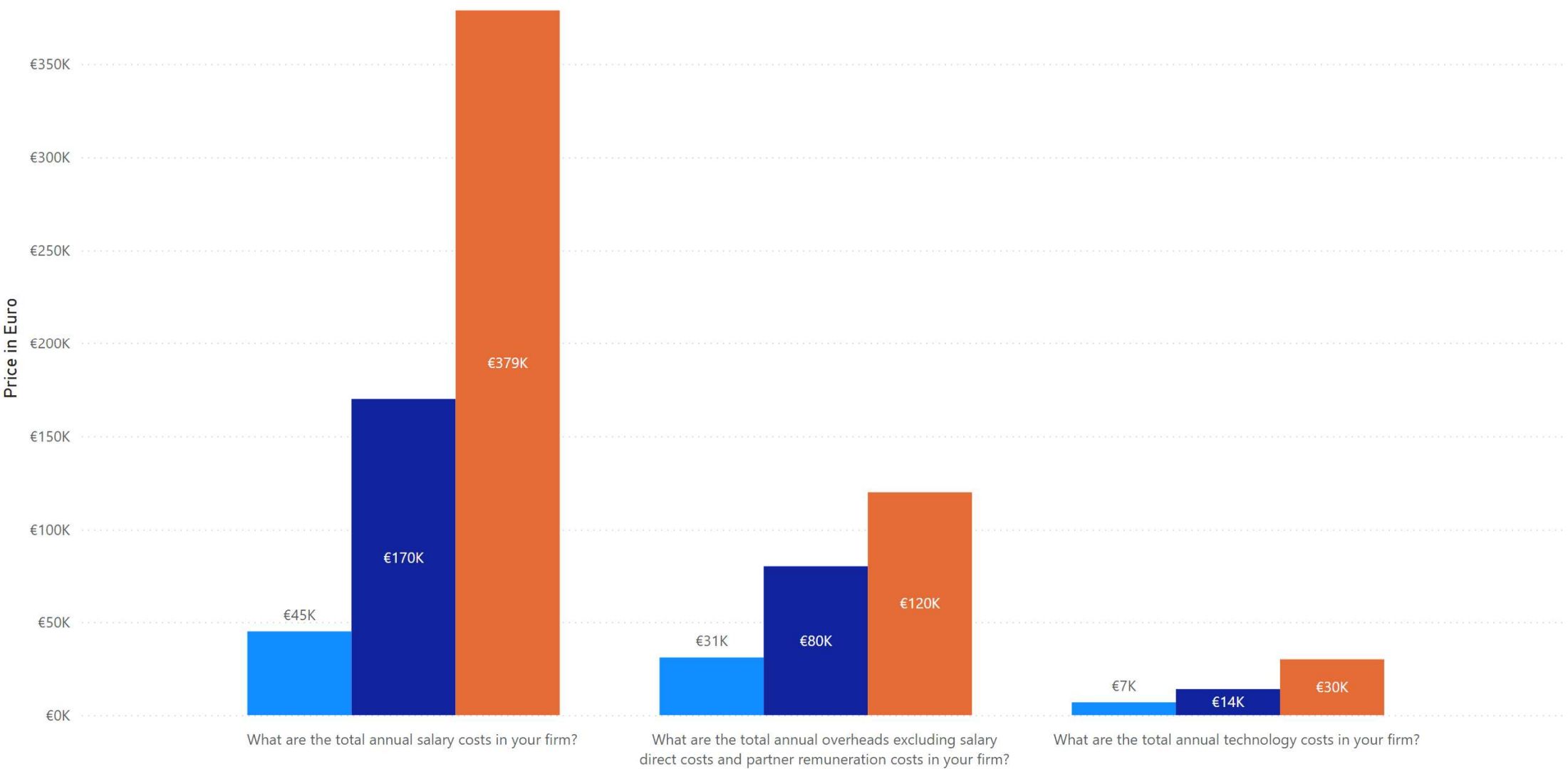
Turnover & Profit

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



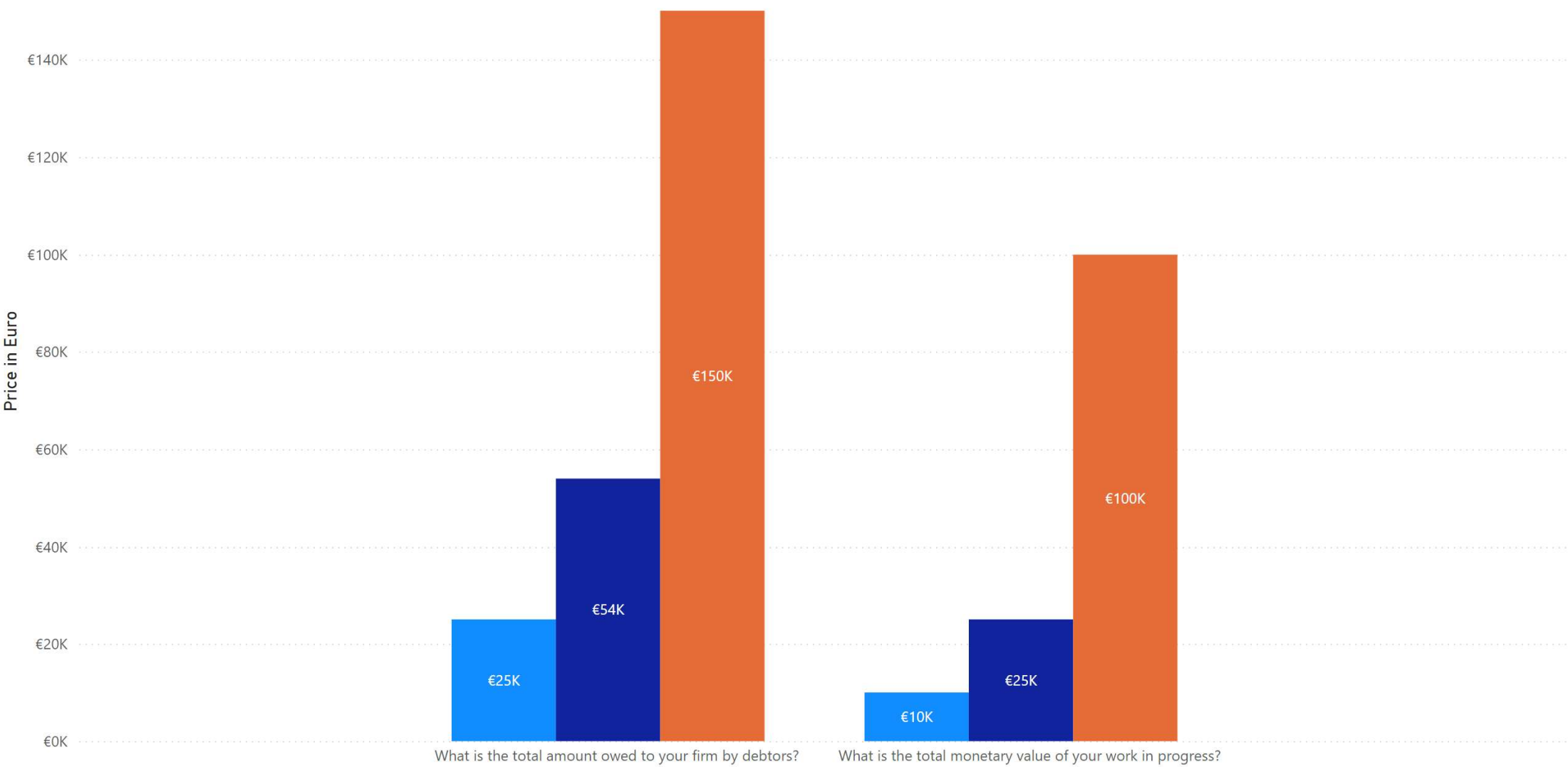
Costs

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



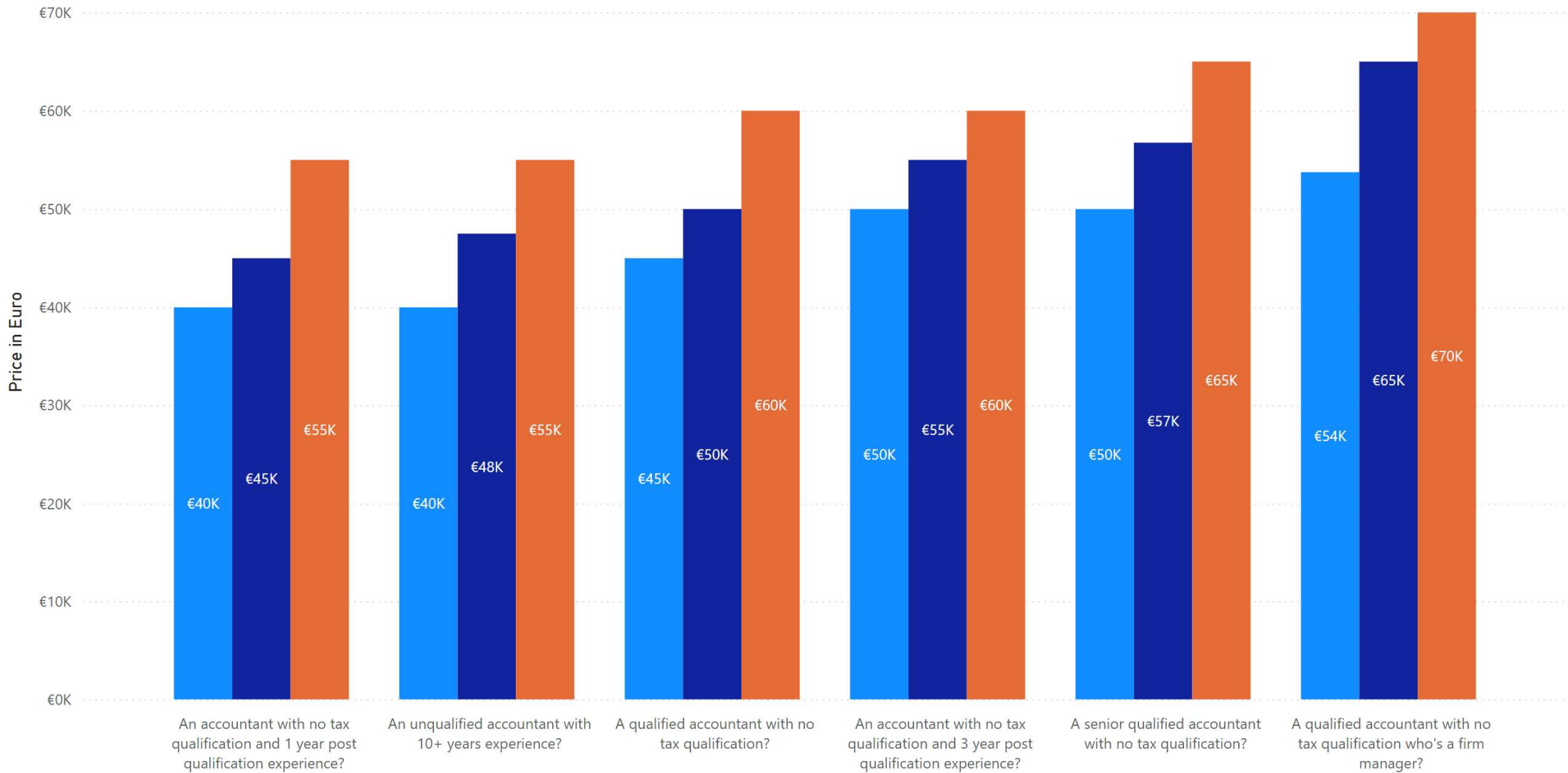
Debtors & WIP

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



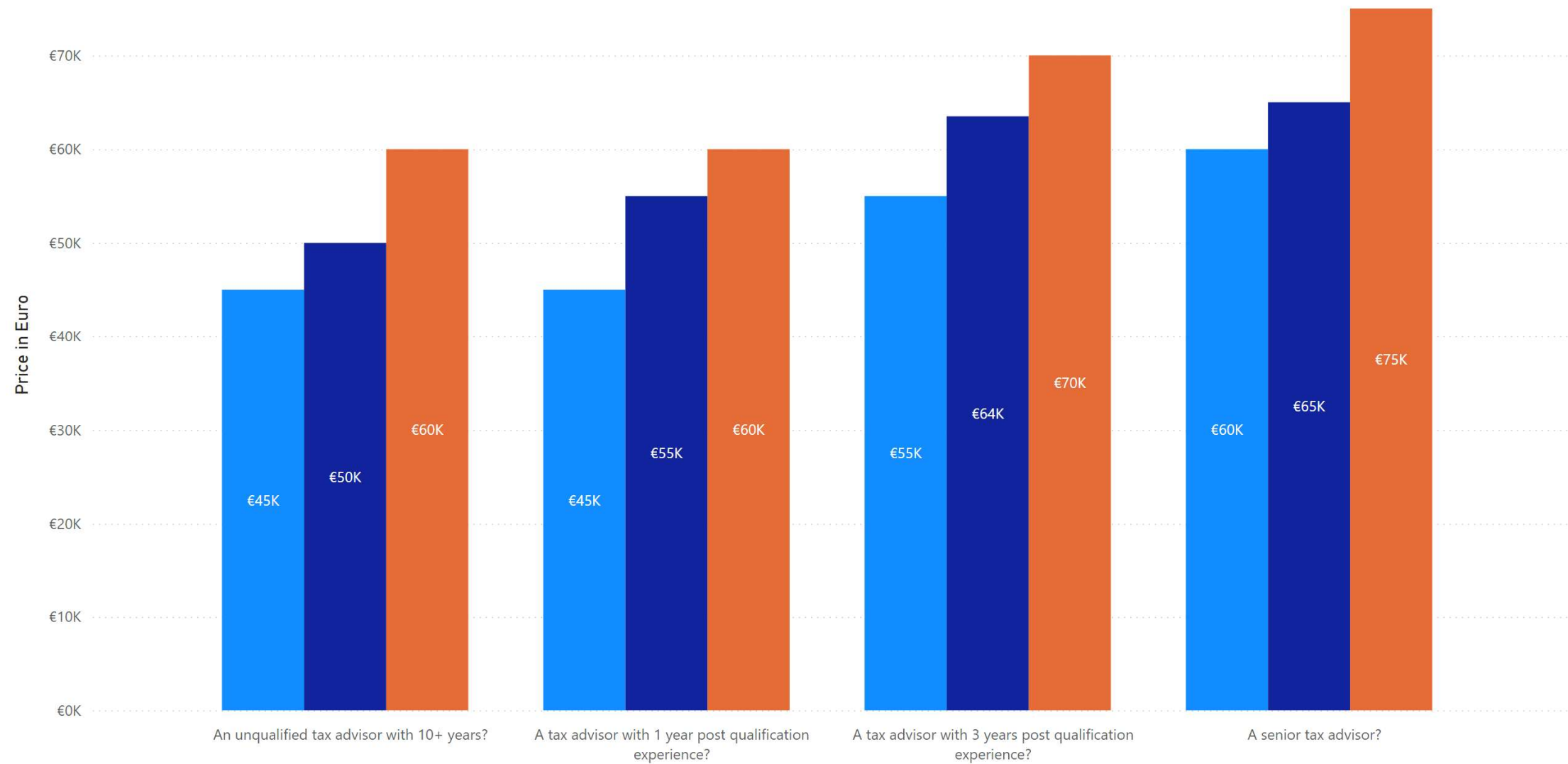
What Salary Would You Pay? - Accountants:

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



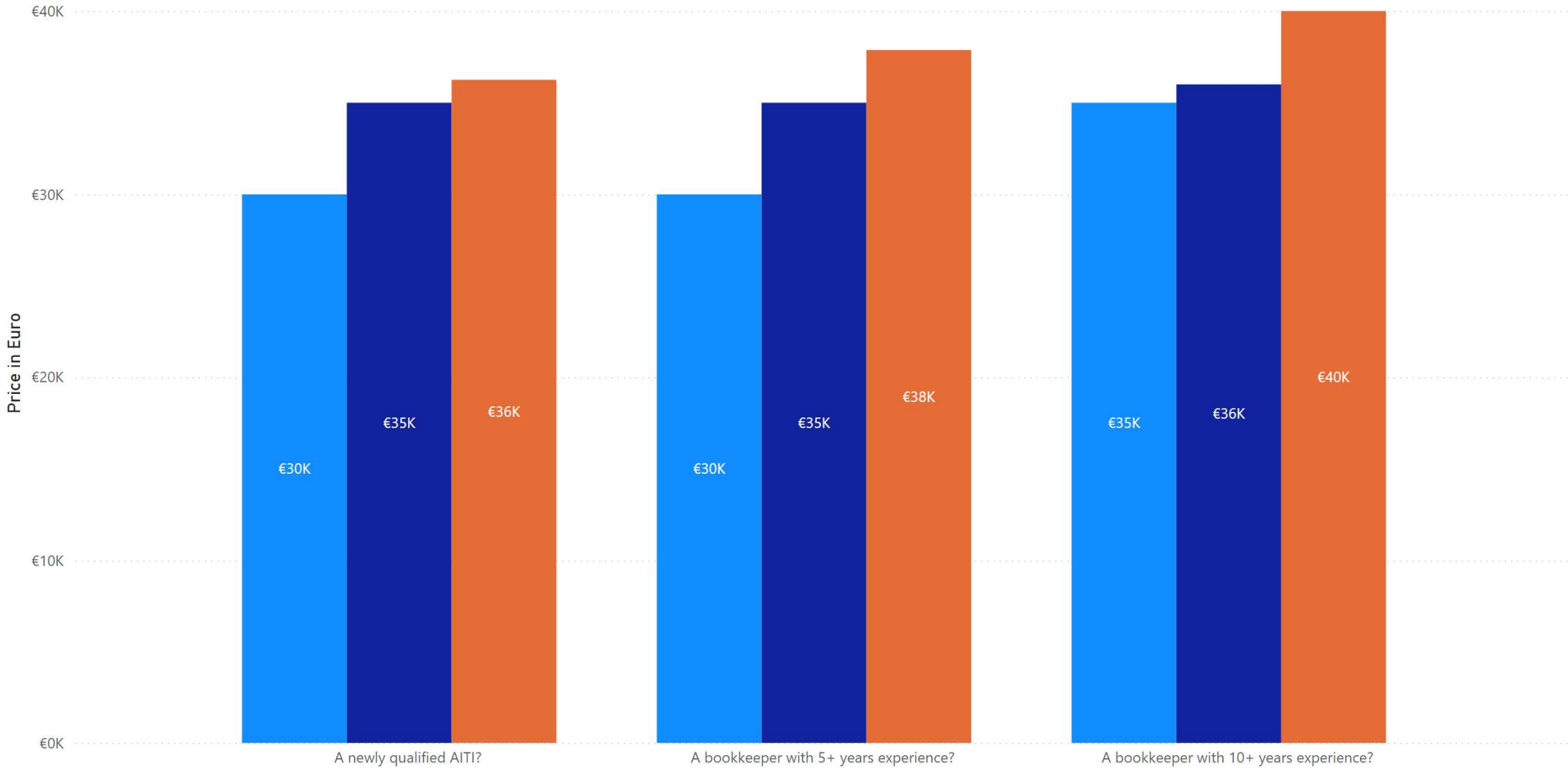
What Salary Would You Pay? - Tax Advisors

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile



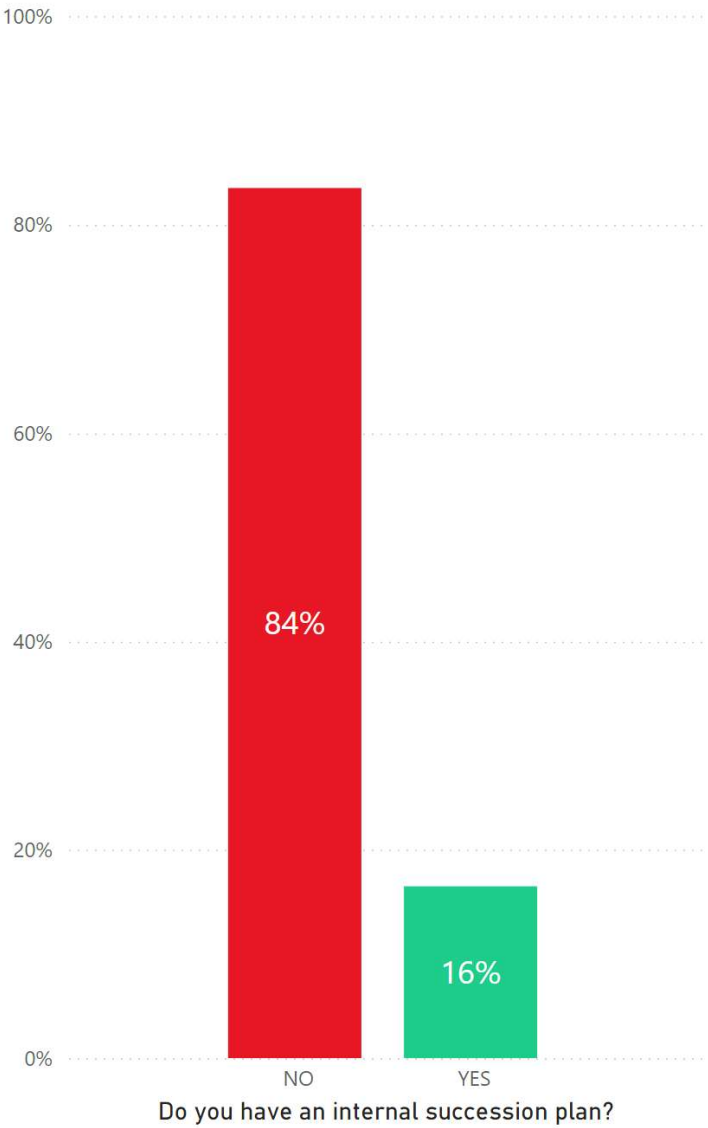
What Salary Would You Pay? - Bookkeepers & Technicians

● Sum of First Quartile ● Sum of Median ● Sum of Third Quartile

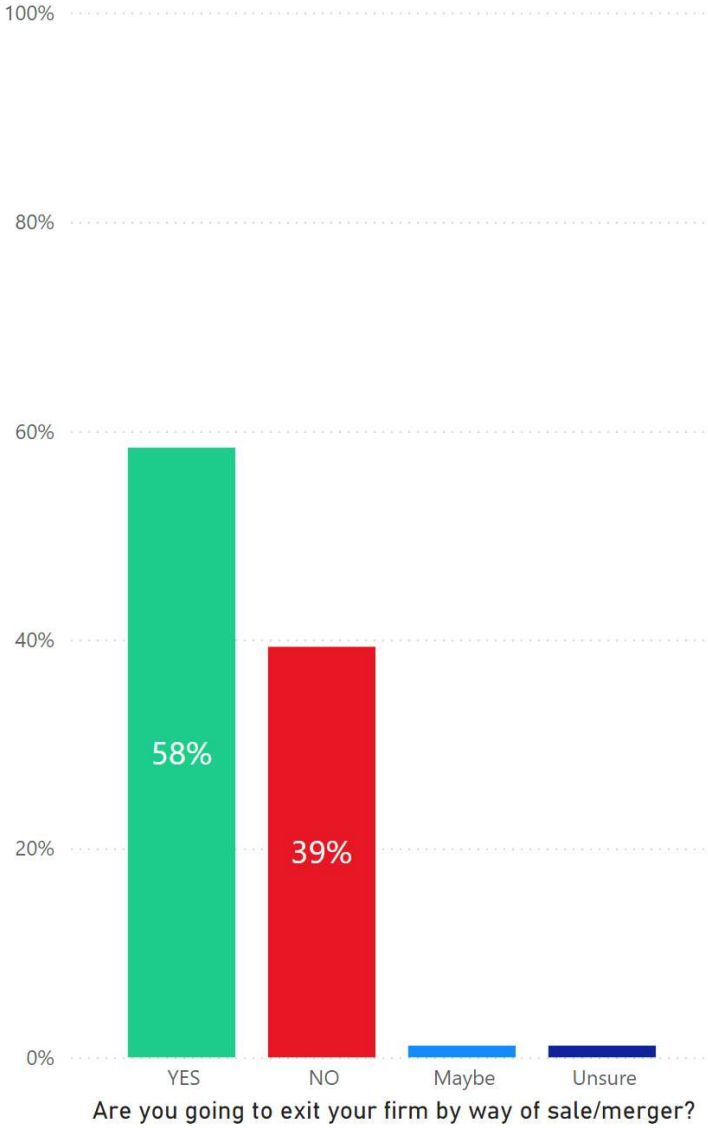


Succession Planning

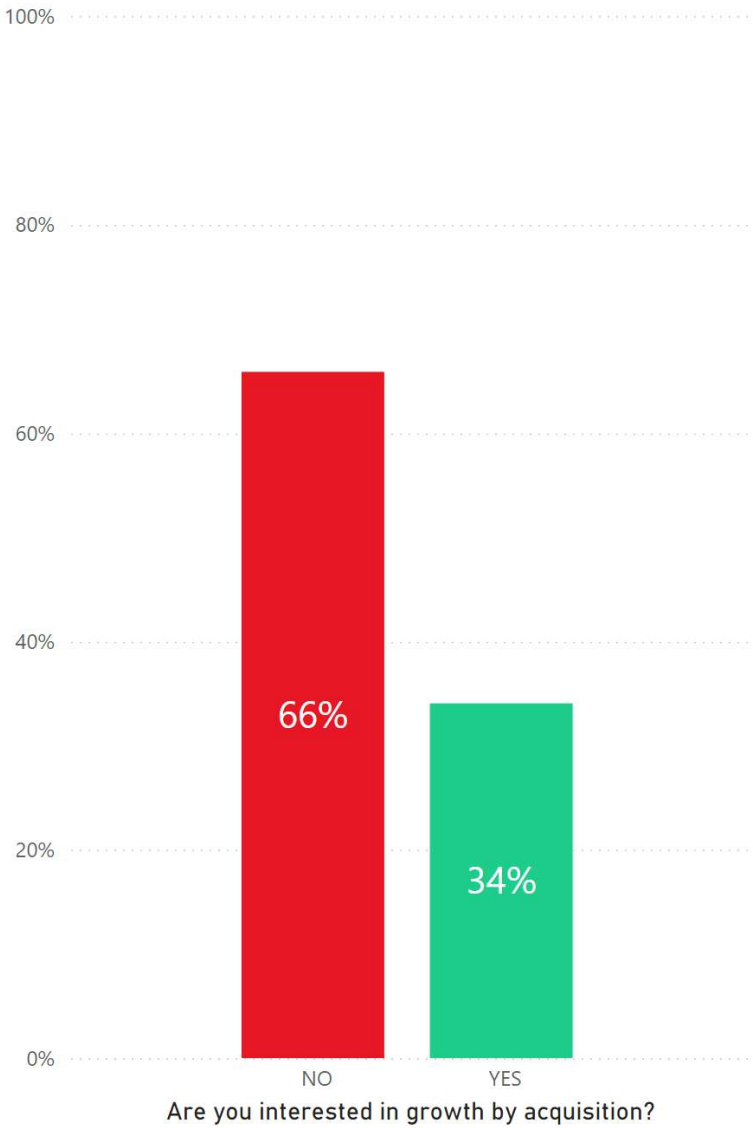
Do you have ... ● NO ● YES



Are you going... ● YES ● NO ● Maybe ● Unsure



Are you interes... ● NO ● YES



ProfitPro Manifesto: The Entrepreneurial Accounting Revolution

1. The Call to a New Cause

We believe the accounting and bookkeeping profession stands on the edge of a great transformation. It's time to shatter the old barriers and redefine what it means to be a **firm owner**. Too long, accountants and bookkeepers have been boxed in by outdated regulations, limited mindsets, and a race to the bottom on fees. **ProfitPro** represents the shift toward **entrepreneurial leadership**—where firm owners capture the value they create, deliver outstanding service to clients, and build a business that rewards everyone involved.

2. The Enemy We Oppose

We stand against:

- **The Institutes** that cling to outdated rules and ways of thinking, stifling innovation rather than empowering firm owners to grow.
- **Government Bodies & Revenue Authorities** that see us only as compliance clerks, ignoring the true value we bring as advisors, strategists, and partners in clients' growth.
- **The Big Firms** that keep a stranglehold on status and perpetuate a system of underpaid, overworked professionals.

These are the forces of stagnation—content with the way things have “always been done,” and unwilling to change.

3. Our Shared Belief

- **We Believe** accountants and bookkeepers are more than compliance keepers. Accounting Business Owners are visionaries, strategists, and problem-solvers whose greatest power lies in guiding entrepreneurs to success.
- **We Believe** that accounting businesses shouldn't just be bigger; we should be **better**. Growth is about profitability, personal fulfillment, team engagement, and real impact in our clients' lives.
- **We Believe** in leading through **innovation and entrepreneurship**—constantly improving technology, processes, and pricing models so that accountants can capture their true worth.

4. Why We Are Different

At **ProfitPro**, we refuse to play the old game of “work harder, charge less than the competition.” Instead, we create a **new game**:

- **We Focus on Value**—helping accountants set prices that match the transformative impact they have on clients.
- **We Build Self-Managing Firms**—giving owners the freedom to lead strategically, cultivate top-tier teams, and reclaim their personal lives.
- **We Champion Growth in All Forms**—from personal development and leadership to building scalable systems and unstoppable teams.
- **We co-create Profitable, Sustainable, Scaleable, Saleable Accounting Businesses with the firm owners who want to make a difference and make money while doing it.**

Where others cling to archaic rules and compliance tasks, we see an opportunity for radical entrepreneurial freedom.

5. Who It's For (and Who It's Not)

- **For the entrepreneurial firm owner** who envisions a profitable, sustainable, **scaleable, and saleable** business that serves clients brilliantly and creates life-changing careers for their team.
- **Not** for those content to remain in the same rut, undercharging and undervaluing themselves, blaming “the system” or “the economy” for their stagnation.

6. The New Opportunity

We offer accountants and bookkeepers the **Accountants Growth Formula**—a proven blueprint that goes beyond just “getting bigger.” It's about:

- **Growing** profits, team culture, and client relationships.
- **Growing** personal capabilities as a leader and visionary.
- **Growing** impact—empowering clients to scale and thrive.
- **Growing** freedom—building a business that supports the lifestyle you choose.

7. Our Rallying Cry

We're starting a **mass movement** of accounting and bookkeeping firm owners committed to delivering outstanding service and forging a new era of possibility for themselves, their teams, and their clients. By embracing **ProfitPro** and the **Accountants Growth Formula**, you stand among those who say, “Yes, we can do better. We deserve more—and so do our clients.”

8. The Future We're Creating

Imagine a world where:

- Accountants lead with confidence and creativity, not fear.
- Firms attract **top talent** because of their vibrant culture and ambitious, supportive leadership.
- Client relationships thrive on trust, professional advice, and **real transformation**—not just compliance forms.
- Business owners everywhere recognize the pivotal role accountants play in their success, gladly paying premium fees in exchange for premium value.

This is the future ProfitPro envisions—**and we invite you to be part of it.**

9. Your Decision

The opportunity is immeasurable, but not everyone will take this step. **Will you join us** in rising above the old ways—creating a firm that truly reflects your worth and the value you provide? **Or will you remain on the sidelines**, watching as our profession evolves around you?

We choose the path of growth. We choose to elevate ourselves, our clients, and our teams.

We are **ProfitPro**—the entrepreneurial accountants who refuse to settle for less.

Signed,

Des O'Neill and the ProfitPro Movement

“Accounting and Bookkeeping is no longer just about compliance—it’s about creating real impact and real wealth for you, your team, and your clients.”



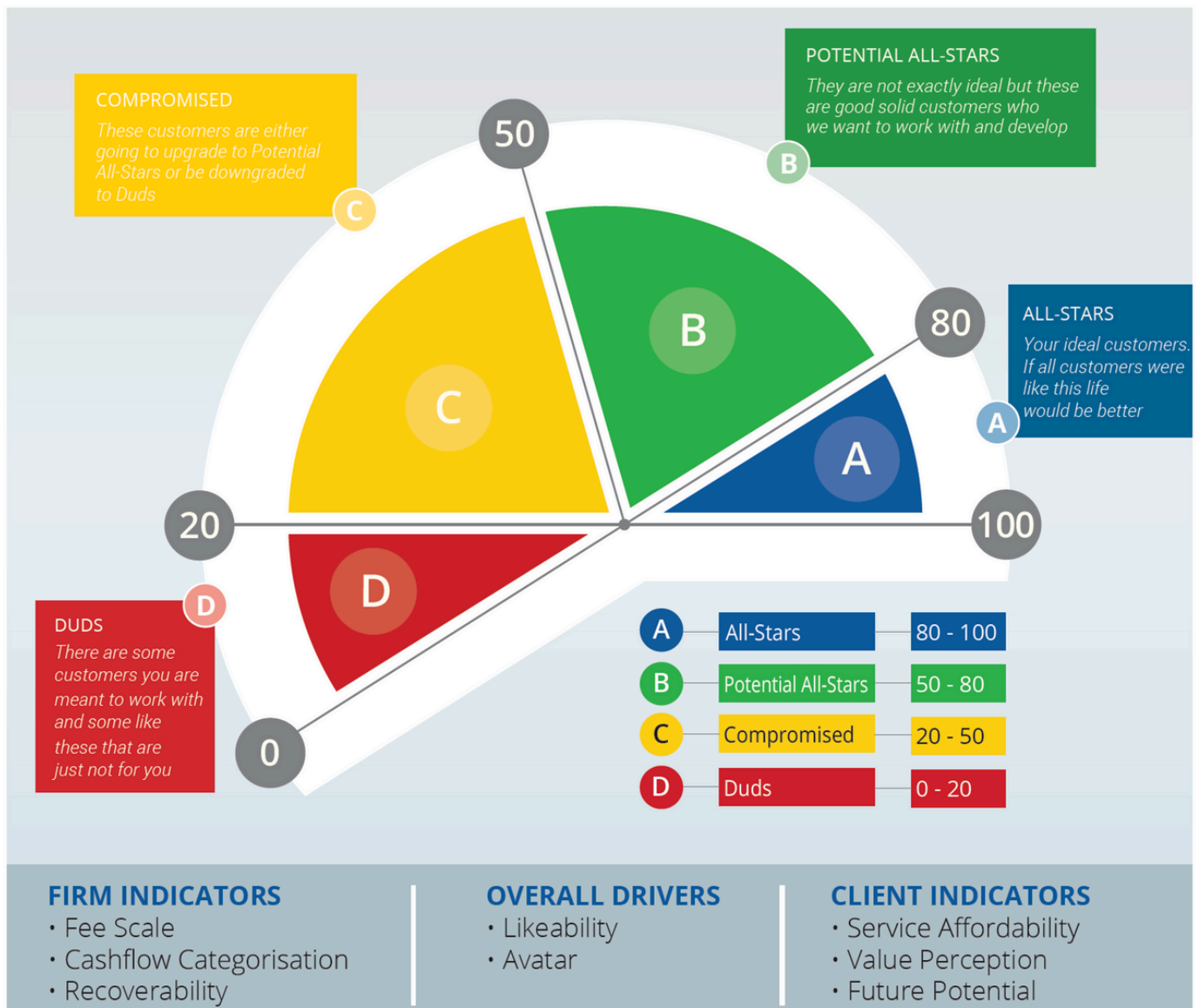
THE PROFITPRO PROFITABILITY MASTERCLASS 2025

WORKBOOK 1

INDEX

- 03** Pruning Your Client List
- 04** Client Pruning Matrix
- 05** Basic Billing Control Sheet
- 06** Advanced Billing Control Sheet
- 07** Masterclass Lesson 1 Optimiser

PRUNING YOUR CLIENT LIST



Score	Each Area	1 is the worst and 10 is the best
A	Over 50	
B	From 36/60 to 50/60	
C	From 21/60 to 35/60	
D	Under 20/60	

[illegible]

BASIC BILLING CONTROL SHEET

Client Name _____

Period / Year End _____

	Hours	Value
Budgeted Fee		
Actual cost		
Profit / Loss on Task	0.00	0.00
Allocated To		
Staff Name		
Staff Name		
Staff Name		
Must = 0	0	0.00

Reason for variance

Work priced incorrectly
 Client caused an issue
 Work took longer to complete than expected
 Inefficient process for completing the work
 Other - e.g. new client set up, software malfunction etc

Rectification action plan

What caused the issue(s)?

How can this be avoided the next time?

Invoice No:	
Allocated To	(Staff Name)
Approved By	(Partner/Principal)
Processed By	(Practice Administrator)
Final Internal Bill Report Attached	(Date)
Exception Report Notified	(Staff Name)

ADVANCED BILLING CONTROL SHEET

Client Name _____

Period / Year End _____

	Hours	Value
Budgeted Fee		
Actual Time/Cost to Date		
Projected Time/Cost to Complete		
Total Cost	0	0
Actual Fee		
Profit / Loss	0	0
Allocated To		
Staff Name		
Staff Name		
Staff Name		
Must = 0	0	€0.00

Reason for variance

Work priced incorrectly	
Client caused an issue	
Work took longer to complete than expected	
Inefficient process for completing the work	
Other - e.g. new client set up, software malfunction etc	

Rectification action plan

What worked and how can we make it even better next year?

What didn't work? What caused this? How can this be avoided the next time?

How can we improve this engagement and what actions do we need to take?

Are there other services that we can provide the client? How can we improve the relationship and the value they perceive?

Invoice No:	
Allocated To	(Staff Name)
Approved By	(Partner/Principal)
Processed By	(Practice Administrator)
Final Internal Bill Report Attached	(Date)
Exception Report Notified	(Staff Name)

Masterclass Lesson 1 Optimiser

Lesson No 1 – The Client Opportunity

1. What in this Lesson have you heard before that you know you “Should do”?

2. What in this Lesson did you disagree with that will not work you or your business? (Get curious whenever you get furious)

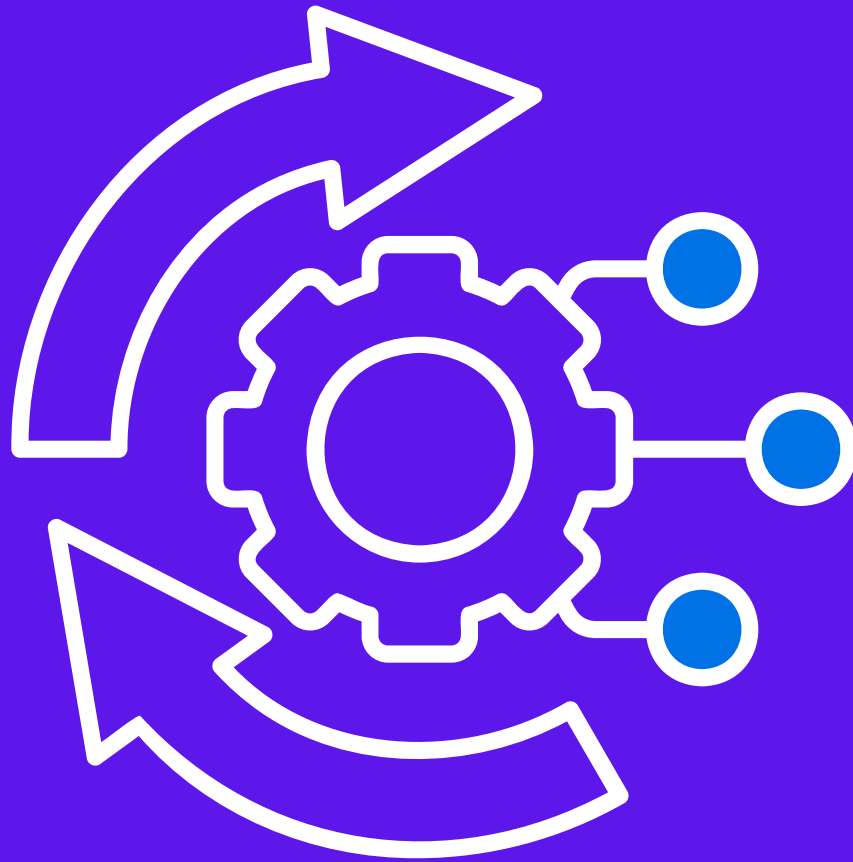
3. What were the Ah Ha’s that you had in this Lesson?

4. Who do you need to share the insights with?

5. What are the Action Points that you need to take away from this Lesson?

“Remember, as you implement the strategies and tools in this programme, execution trumps knowledge every day of the week.”

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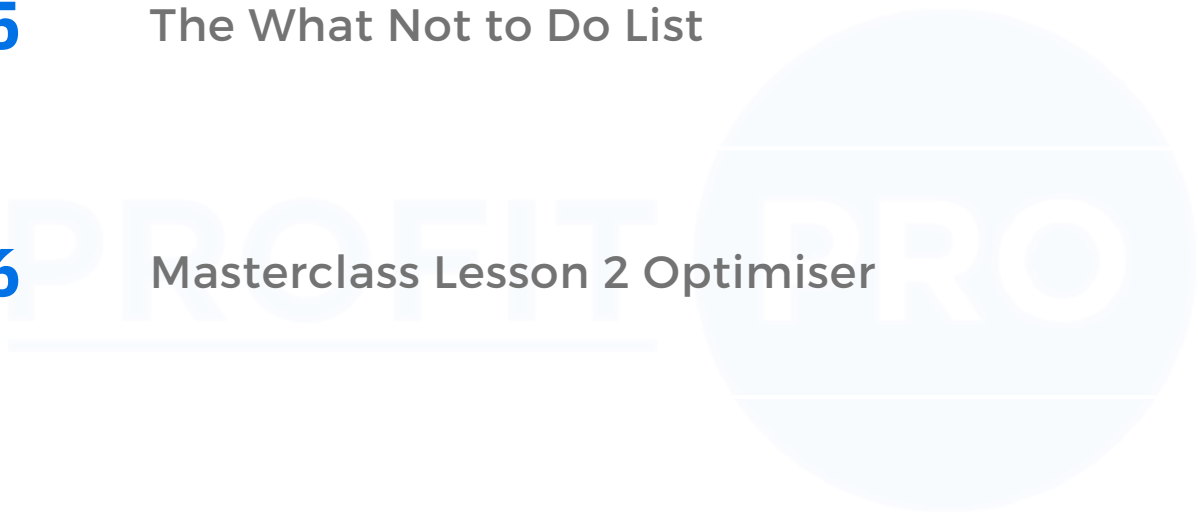
WORKBOOK 2

INDEX

03 The Technology Transformer Tool

05 The What Not to Do List

06 Masterclass Lesson 2 Optimiser



THE TECHNOLOGY TRANSFORMER TOOL

1. How do you feel about technology in your firm? Are you ahead of the curve or behind the curve? Describe technology in your business and how you are using it.			
2. What are you using in these areas of the business and how would you score your technological effectiveness on a scale of 1-10 where 10 is the brilliant and 1 is terrible in each area?			
Practice Management	Score out of 10	Time Tracking	Score out of 10
Pricing and Proposals	Score out of 10	CRM	Score out of 10
AML	Score out of 10	Bank Data Capture	Score out of 10
Document Capture	Score out of 10	E-commerce Data Capture	Score out of 10
Bookkeeping 1 (if using multiple)	Score out of 10	Bookkeeping 2 (if using multiple)	Score out of 10
Bookkeeping 2 (if using multiple)	Score out of 10	Accounts Production	Score out of 10
Tax Preparation & Filing	Score out of 10	Working Papers	Score out of 10
Payroll	Score out of 10	Reporting 1 (if using multiple)	Score out of 10
Reporting 2 (if using multiple)	Score out of 10	Cashflow	Score out of 10
Credit Control	Score out of 10	Invoice Payments	Score out of 10
Team Communications	Score out of 10	Project Management	Score out of 10
Email	Score out of 10	Calendar & Scheduling	Score out of 10
Client Messaging	Score out of 10	Primary AI	Score out of 10
Automations	Score out of 10	Standard Operating Procedures	Score out of 10
Other	Score out of 10	Other	Score out of 10
Other	Score out of 10	Other	Score out of 10
Other	Score out of 10	Other	Score out of 10

3. WHAT'S WORKING? WHAT WORKED	4. WHAT'S NOT? WHAT DIDN'T?
5. IMPROVEMENT	6. ACTION
Knowing what you know now, how could you enhance or refine your technology in 2025?	What would produce a much more strategic, successful and satisfying experience in the future?
	1.
	2.
	3.
	4.
	5.

THE WHAT NOT TO DO LIST

LIST THE ACTIONS YOU SPEND TIME ON		CIRCLE ONE OF THE FOLLOWING FOR EACH		
1.		AUTOMATE	DELEGATE	ELIMINATE
2.		AUTOMATE	DELEGATE	ELIMINATE
3.		AUTOMATE	DELEGATE	ELIMINATE
4.		AUTOMATE	DELEGATE	ELIMINATE
5.		AUTOMATE	DELEGATE	ELIMINATE
6.		AUTOMATE	DELEGATE	ELIMINATE
7.		AUTOMATE	DELEGATE	ELIMINATE
8.		AUTOMATE	DELEGATE	ELIMINATE
9.		AUTOMATE	DELEGATE	ELIMINATE
10.		AUTOMATE	DELEGATE	ELIMINATE
WHAT ARE THE TOP 3 ACTIONS THAT MOVE THE NEEDLE THE MOST IN MY LIFE?				
1.	2.	3.		
WHAT ARE THE TOP 3 THINGS I MUST ELIMINATE FIRST IN MY LIFE?				
1.	2.	3.		

Masterclass Lesson 2 Optimiser

Lesson No 2 – The Technology Transformer

1. What in this Lesson have you heard before that you know you "Should do"?

2. What in this Lesson did you disagree with that will not work you or your business? (Get curious whenever you get furious)

3. What were the Ah Ha's that you had in this Lesson?

4. Who do you need to share the insights with?

5. What are the Action Points that you need to take away from this Lesson?

**"The differentiators between
thriving and surviving:
Mindset. Belief. Action."**

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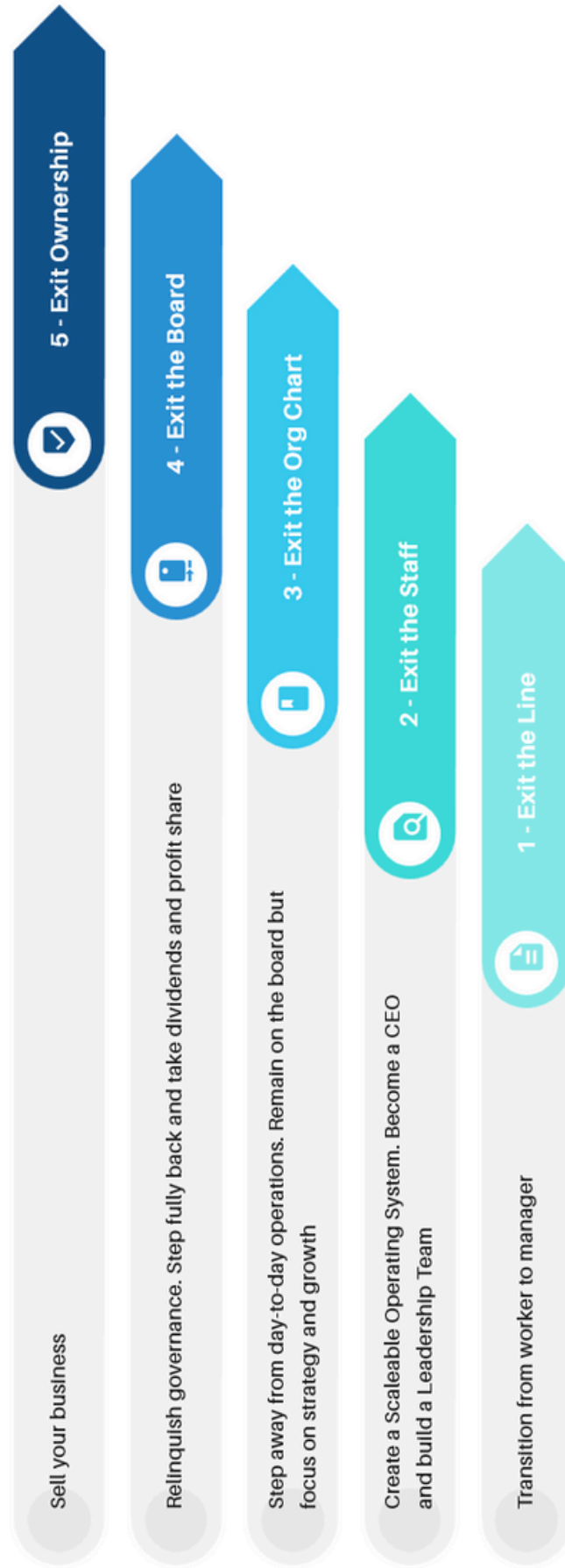
WORKBOOK 3

INDEX

- 03** The Five Stages of Exit
- 04** The 6 Step Success Path
- 05** Firm Strategy Scorecard
- 07** More Time
- 08** Masterclass Lesson 3 Optimiser
- 09** The Accountants Growth Formula Sign up

THE 5 STAGES OF EXIT

THE 5 "EXITS" OF ENTREPRENEURS



THE 6 STEP SUCCESS PATH



Overall Firm Strategy

- Our Foundational Strategy
- Our Business Model
- Strategy Fundamentals
- Our Why

Your People

- Our WHO Hunting Strategy
- Our Routines & Rituals
- The Inventory Tracker
- Our Organisation Chart

The 4 P's

- Our Positioning
- Our Pricing
- Our Product
- Our Proposition

Your Customers

- Customer Grading Matrix
- Our Ideal Customer
- Red Velvet Rope Policy
- Key Business Metrics

Business Growth

- Sales Strategy
- Digital Marketing Strategy
- Lead Generation Strategy
- Marketing 101

Leverage & Scale

- Innovation & Improvement
- Leadership & Personal Effectiveness
- Technology & Automation
- Production and Delivery

FIRM STRATEGY SCORECARD

Firm Strategy Scorecard

Overall Firm Strategy

	Our Foundational Strategy
	Our Business Model
	Strategy Fundamentals
	Our Why

Your People

	Our WHO Hunting Strategy
	Our Routines & Rituals
	The Inventory Tracker
	Our Organisation Chart

The 4 P's

	Our Positioning
	Pricing
	Our Product
	Our Proposition

Your Customers

	Customer Grading Matrix
	Our Ideal Customer
	Red Velvet Rope Policy
	Key Business Metrics

Business Growth

	Sales Strategy
	Digital Marketing Strategy
	Lead Generation Strategy
	Marketing 101

Leverage & Scale

	Innovation & Improvement
	Leadership & Personal Effectiveness
	Technology & Automation
	Production and Delivery

FIRM STRATEGY SCORECARD

Where are you on the 6 Step Success Path?		
Overall Firm Strategy		
Are you clear on what you are doing and why?		Disagree
Have you documented your Strategy Fundamentals		Agree
Are you clear on your business model?		Neutral/ Unsure
Are you clear on your 5 year, 3 year and 1 year Strategic outcomes		Disagree
Your People		
Do you have a documented Org Chart with Roles Responsibilities and KPIs for each team member so they know what is expected of them?		Agree
Have you got an agreed Meeting Rhythm that will ensure that the team succeed?		Neutral/ Unsure
Have you the right internal and external team to get the result you are looking for?		Neutral/ Unsure
Are you on the look out for future team members and do you have a WHO Hunting Process?		Disagree
The 4 Ps		
Have you documented what your Products and Services are?		Agree
Do you have a Price List and Pricing Calculator?		Disagree
Do you collect all payments on a Pay as You Go Basis?		Neutral/ Unsure
Can you clearly verbalise what your Proposition is so a 12 year old would understand?		Neutral/ Unsure
Your Customers		
Have you got a documented Red Velvet Rope Policy?		Agree
Have you documented who your Ideal Client Avatar is to but your products and services at the price point you are selling them?		Agree
Do you track your key customer metrics?		Disagree
Have you graded your existing customers and do you Prune your Client list annually?		Neutral/ Unsure
Business Growth		
Do you have a documented marketing and sales plan and are you currently drowning in leads?		Agree
Do you have your Marketing 101 Foundations in place to include a brochure website, social media profiles, specifically, linkedin and ability for prospective clients to book a call through your website?		Neutral/ Unsure
Do you have 4 primary lead generation activities in place and 4 secondary lead generation activities in place?		Neutral/ Unsure
Our Sales Strategy is clearly documented and allows us convert prospects even when the people having the sales conversations don't like to sell		Disagree
Leverage & Scale		
How do you rate your technology and AI capabilities		Agree
Have you documented systems and processes that will allow you scale the business?		Disagree
Is your firm saleable today?		Neutral/ Unsure
Do you and your team invest in developing your leadership and your personal effectiveness		Disagree

MORE TIME



Masterclass Lesson 3 Optimiser

Lesson No 3 – Taking Control & Taking Real Ownership

1. What in this Lesson have you heard before that you know you "Should do"?	2. What in this Lesson did you disagree with that will not work you or your business? (Get curious whenever you get furious)
3. What were the Ah Ha's that you had in this Lesson?	4. Who do you need to share the insights with?
5. What are the Action Points that you need to take away from this Lesson?	

SIGN UP TO THE ACCOUNTANTS GROWTH FORMULA

The Accountants' Growth Formula Signature Programme Order Form

Email

First Name

Last Name

Practice Name

Street Address

Town / City

Eircode

Country

Contact Number

Your Product:

Accountants' Growth Formula
Monthly Pay

3 Monthly Installments €197/
£177 Per Month

☐

Accountants' Growth Formula
Single Pay

Discounted Single Pay Plan
€497/£447

☐

Take a photo of this form and email it to: mmurphy@omnipro.ie and
Maeve Murphy will sign you up today.



**"Take Action - An inch of movement
will bring you closer to your goals
than a mile of intention."**

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PRICE RISE CALCULATION	CURRENT	10% INCREASE	20 % INCREASE
TURNOVER			
STAFF COSTS EXCLUDING PARTNER/PRINCIPLE			
GROSS PROFIT			
OVERHEADS			
NET PROFIT			
NET PROFIT % INCREASE			

My Firm Pricing Menu

Service Description	Minimum Fee	Mid Range Fee	Optimum Fee
Bookkeeping			
0 -50 Transactions Per Month			
51-100 Transactions Per Month			
101-200 Transactions Per Month			
201-300 Transactions Per Month			
301-500 Transactions Per Month			
501 + Transactions Per Month			
VAT			
0 -50 Transactions Per Month			
51-100 Transactions Per Month			
101-200 Transactions Per Month			
201-300 Transactions Per Month			
301-500 Transactions Per Month			
501 + Transactions Per Month			
Payroll			
1st Employee			
2-5 Employees			
6-10 Employees			
11-20 Employees			
21 -30 Employees			
30 + Employees			
Contractors Tax			
1st Contractor			
2-5 Contractors			
6-10 Contractors			
11 - 20 Contractors			
20 + Contractors			
Income Tax			
Income Tax Return Employee			
Income Tax Return Director			
Income Tax Return Rental			

Sole Traders			
Less than €50k/£50k Turnover			
Less than €100k/£100k Turnover			
Less than €250k/£250k Turnover			
Greater than €250k/£250k Turnover			
Audit Exempt Co			
Dormant			
Less than €50k/£50k Turnover			
Less than €100k/£100k Turnover			
Less than €250k/£250k Turnover			
Less than €500k/£500k Turnover			
Less than €750k/£750k Turnover			
Less than €1m/£1m Turnover			
Less than €2m/£2m Turnover			
Less than €3m/£3m Turnover			
Greater than €3m/£3m Turnover			
Audits			
Large Audit			
Small Audit			
Regulated Entity			
Compulsory Audit			
Management Accounting			
Quarterly Management Accounts			
Bi-Monthly Management Accounts			
Monthly Management Accounts			
KPI Reporting			
Live Dashboard			
Company Secretarial Support			
Company Formation			
Company Formation & Tax Registration			
AGM Pack			
Annual Returns & Accounts			
Registered Office			
CGT Returns			

The Results Conversation is a way of transforming your positioning and relationship with existing customer and wowing potential new customers. The Results Conversation below is a sample script that can be tailored for your customers, so you can ensure that you are not only have the right conversations, but you are also well on your well to delivering the results your customer actually wants.

THE RESULTS CONVERSATION
1. THE BASIC STRUCTURE:
• WHAT IS IMPORTANT TO YOU IN YOUR BUSINESS?
• WHAT DO YOU WANT?
• WHAT DO YOU REALLY WANT?
• WHAT DO YOU REALLY REALLY REALLY WANT?
• WHAT DOES SUCCESS LOOK LIKE FOR YOU?
• DO YOU WANT HELP GETTING THE RESULT YOU REALLY WANT?
• DO YOU WANT THAT PERSON TO BE ME?

2. SETTING THE STAGE FOR A WINNING CUSTOMER CONVERSATION

- **Elements of Human Communication**

- 7% Words
- 38% Voice and Tone
- 55% Body Language

- **Personal Communication Modality**

- **Auditory**
- Visual
- Kinesthetic
- Auditory Digital
- Establish what your primary communication type is?
- Based on verbal cues and body language establish what the persons communication modality is

- **Matching Mirroring and Leading**

- The Art of Charisma
 - People like people that are like them
- Match their Communication Modality based on the cues in their language
- Mirror their body language and tonality
- Connection on a visual level and open body language

- Establish rapport through words, tone, voice and body language and begin to lead the conversation

- Talkers dominate the conversation while listeners control it

3. THE QUESTIONS AND THE APPROACH

- WHAT DO YOU WANT FROM ME AS AN ACCOUNTANT, AS A TAX ADVISOR AND AS YOUR BUSINESS ADVISOR? WHAT CAN I DO TO HELP YOU?

- WHAT DO YOU FEEL IS THE MOST IMPORTANT THING TO YOU ABOUT BEING IN BUSINESS?

- WHAT DO YOU WANT TO ACHIEVE IN YOUR BUSINESS?

THE RESULTS CONVERSATION

- ON A SCALE OF 1 TO 10 WHERE 10 IS VERY IMPORTANT HOW IMPORTANT IS FEELING IN CONTROL OF YOUR OWN DESTINY TO YOU?

- WHO ARE THE MOST IMPORTANT PEOPLE IN YOUR LIFE AND HOW DO YOU FEEL YOUR BUSINESS IMPACTS ON THEM BOTH POSITIVELY AND NEGATIVELY

- HOW PROUD ARE YOU OF YOUR BUSINESS RIGHT NOW?

- HOW FINANCIALLY SUCCESSFUL DO YOU FEEL YOUR BUSINESS IS RIGHT NOW ON A SCALE OF 1-10 WHERE 10 IS VERY SUCCESSFUL?

- HOW HAPPY ARE YOU WITH YOUR CURRENT ROLE IN THE BUSINESS?

- HOW IMPORTANT IS HAVING A HAPPY BALANCED LIFE FOR YOU ON A SCALE OF 1 TO 10 WHERE 10 IS PERFECTLY BALANCED?

- HOW WELL BALANCED IS YOUR WORK LIFE BALANCE NOW?

- WHAT IS THE MOST IMPORTANT THING YOU CAN DO TO HELP YOU ACHIEVE FINANCIAL FREEDOM?

- HOW IMPORTANT IS IT FOR YOU TO FEEL THAT YOU HAVE AN EFFECTIVE PLAN TO EXIT YOUR BUSINESS?

- DO YOU FEEL YOUR BUSINESS IS REALISING ITS FULL POTENTIAL?

- HOW VULNERABLE DO YOU FEEL YOUR BUSINESS IS NOW?

- HOW FINANCIALLY FREE AND INDEPENDENT ARE YOU ON A SCALE OF 1 TO 10 WHERE 10 IS TOTAL FINANCIAL FREEDOM?

- DO YOU FEEL IN CONTROL OF YOUR BUSINESS?

- WHAT DOES SUCCESS LOOK LIKE FOR YOU?

• HOW WILL YOU KNOW WHEN YOU HAVE GOTTEN YOUR NO.1 BIG RESULT?
• DO YOU WANT HELP GETTING THE RESULT YOU REALLY WANT?
• DO YOU WANT THAT PERSON TO BE ME?
• OTHER QUESTIONS

CUSTOMER UPGRADE OR TERMINATION CHECKLIST



Customer name:			
Checklist creation date		Checklist completion Date:	

Stage 1 – Overall Assessment	
QUESTION	What grading is the customer based on your customer grading matrix?
ANSWER	
QUESTION	Does this customer meet the minimum requirements of your red velvet rope policy?
ANSWER	
QUESTION	What are the annual recurring fees for this customer?
ANSWER	
QUESTION	What are the potential for fee increases and once off fees for this customer in the next 7 years?
ANSWER	
QUESTION	What is the lifetime value of this customer (assume recurring and non-recurring fees over 7 years incorporating any likely once off fees)?
ANSWER	
QUESTION	What are the behaviours or characteristics of this customer that are unacceptable to me?
ANSWER	
QUESTION	Irrespective of any action i take and any improvement that this customer can possibly make do i need to fire this customer for the benefit of my business and /or my customers and/or my team and/or me. (if yes move to termination conversion “it’s not you. It’s me” in stage 4).
ANSWER	

Stage 2 – If they are a potential Keeper

QUESTION	Will raising fees move this customer up a grade?
ANSWER	
QUESTION	What is the minimum fee that will move this customer up a grade?
ANSWER	
QUESTION	What specific behaviour improvements are required in conjunction with the fee increase to move this customer up a grade?
ANSWER	
QUESTION	What can i do to improve the working relationship and change the behaviours of this customer?
ANSWER	
QUESTION	What are the exact parameters that the customer needs to adhere to meet the levels of acceptable behaviour?
ANSWER	

Stage 3 – Modified Results Conversations and Fee Increase

3A - BASIC RESULTS CONVERSATION

QUESTION	What do you want from me as an accountant, a tax advisor and a business advisor?
ANSWER	
QUESTION	What do you really really want?
ANSWER	
QUESTION	What are the most important things for you about being in business?
ANSWER	
QUESTION	Who are the most important people in your life and how does your business impact on them (positively and negatively)?
ANSWER	
QUESTION	What do you want to achieve in your business?
ANSWER	
QUESTION	What do you really, really, really want?
ANSWER	
QUESTION	Do you want me to help you with that?
ANSWER	

3B -Modified Results Conversation	
QUESTION	There are certain things happening that are impacting on our relationship that are unacceptable to us?
ANSWER	
QUESTION	Before we progress any further in the process do you feel you can meet the parameters of being an ideal customer for us
ANSWER	
QUESTION	If you can meet the basic requirements of a mutually beneficial working relationship, we can move to the proposal process whereby i will give you 3 options of prices based on the services you have indicated that you want and you can choose how we work together.
ANSWER	
ACTION	Move to the proposal process
	<i>SEE PROPOSAL PROGRESS IN PRICING MODULE</i>
ACTION	Review customer in 3 months and 6 months and move to termination if the results have not been achieved

	Objection	Consideration	Objection Raised	Addressed
Objection 1	Money / Price			
		Have you Captured the Value that THEY need?		
		Have you Communicated the Value in their terms using their language?		
		What is the real cost of not coming with you. What will they miss out on? What pain will they continue to experience?		
		What risks are they exposing themselves to that you will address?		
		What are the opportunities that you will create for them?		
		What are the financial benefits of working with you and investing with you?		
		There is someone who will do it cheaper		
Objection 2	Time			
		What will it cost them in terms of time to come work with you?		
		Change costs time. What will you do to save them time as they are switching accountants?		
		What is the value of their time and their teams time and how can you help them work in their unique ability as you and your team work in theirs		
		How can you help them create time freedom as their accountant?		
		What is the value of their time and how can you increase it by releasing them to focus on what is truly important?		
Objection 3	Spouse / Partner			
		Who are the decision makers and are you working with the person or people who have the authority and autonomy to make the decision?		
		Is there a spouse, partner or business partner who should be part of the process and the dialogue? Chinese whispers don't work.		
		What reassurance can you give that the decision to come with you is on the best interest of spouses, partners or business partners?		
		How will this benefit spouses or partners specifically?		

Objection 4	Fear			
		How can working with you create a fear of failure for them?		
		What are their deepest fears in relation to their business?		
		What are their deepest fears outside of their business?		
		How can you address their deepest fears based on the services and supports you are providing?		
		Are they afraid of making a wrong decision? What is the upside? What is the downside? Can they live with the downside		
Objection 5	Self Doubt / Shame			
		They may have had difficulties with their previous accountants. How do you differentiate your approach to get a better result?		
		Opening up your intimate financial history may expose skeletons in the closet. How do you convey that every business has skeletons and that they are not that big a deal?		
		Engaging with new people and doing new things exposes peoples past? What concerns might they have and how can you address them?		
		They may believe that your firm is too big for them, or they are too small, or too young, or too old or, or, or. What is the belief and how do you dispel it?		
		Are they having the “Am I good enough” thoughts?		
Objection 6	Internal Dialogue			
		What are the conversations you are having in your head?		
		What are your limiting beliefs that you need to overcome for them to buy into you?		
		What do you need to do to manage your internal dialogue and develop confidence in yourself?		
		What are the conversations they are having in their head? Ask them		
		What are the conversations they are having in their head? Read between the lines		
		Overcome their objections by entering into the conversations they are having in their head and help them manage their internal dialogue and develop confidence in you		

**"The differentiators between
thriving and surviving:**

Mindset. Belief. Action."

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