

Cliff Notes

Find Your Creative Genius by Samantha Bennett

3 GEMS THAT APPLY TO YOUR CPA PRACTICE

1. The things you really want to do, you do. And the things you really don't want to do often fall to the wayside.

Stop feeling bad about not doing the things you're not going to do. From preparing invoices, to routine client correspondence or advising clients of routine information; those are tasks an accountant should NEVER perform. It's not that you're lazy, it is that these tasks should be delegated to another team member. Stop adding to your to do list and give the things you don't want to do, and that you should not be doing, to someone else.

2. Write down & schedule everything you want and are going to do.

Scheduling appointments and clients is a no-brainer but when it comes to reading, spending time with family or going for a walk, we often don't put that on the calendar. Scheduling out the entire day gives you an incredible sense of freedom, structure and accountability. Scheduling will allow you to accomplish so much more in a day. Besides the calendar holding you accountable, your team will often ask about the movie you saw last night (which was shown on the calendar) or how the table tennis match went (which is always on my calendar). This will also get you excited to do the things that you get to share with others.

3. The words you use to describe yourself reflect your value system.

The words we use to describe ourselves reflect our value system, which will be mirrored by our prospective and current clients. Once you show clients who you are, share your why, and the value you can provide, they WILL pay you the fees you request without awkwardness or hesitation. When you meet with your clients on a regular basis, the meetings will flow organically. And if you don't share the same value system as the client then the process won't go as smooth, and that's okay. You should enjoy working with clients as much as they enjoy working with you.