

SOLOPRENEUR

CONSULTING CASE STUDY



OVERVIEW

Sometimes our dreams seem so out of reach that we give up. My recent client, a successful full-time CFO, had always dreamed of opening his own bookkeeping firm.

With his days already full of commitments as a CFO, he could not afford to put everything on hold to start his own practice.

In fact, with no foreseeable plan to attain his goals, he had almost given up on his entrepreneurial dream altogether.

COACHING HELPS WITH COMPANY SETUP

In our business coaching sessions, we evaluated his current commitments, procedures, and habits. Like many of my clients, a different perspective was exactly what was needed to solve his problem.

First, we reviewed his current schedule and were able to identify a few open pockets of time and a pathway that would allow him to continue to pursue his entrepreneurial dream.

We walked through various software program options for his practice and implemented basic systems including business Gmail, project management software, Asana, and a calendar scheduling program.

CUSTOMIZED TEMPLATES & WORKFLOWS SAVE TIME

Next, I introduced Number Nerd Bookkeeping's established bookkeeping templates and workflows.

We identified which templates he needed for each of the services he was going to offer. In this case, we implemented and customized the Lead (and new sales process), Onboarding, and Service templates.

Finally, we set up his custom templates in his new workflow tool. The templates allowed him to bypass the inefficiencies of a startup, to lessen his learning curve and establish a strong foundation for his early business.

COMMON SYSTEM ROADBLOCKS FOR BOOKKEEPERS

- ✓ ONBOARDING TAKES MORE THAN 20 MINUTES
- ✓ KEEPING TRACK OF ADMIN TASKS & TRACKING TIME
- ✓ SALES PROCESS IS NOT AUTOMATED & TAKES TOO LONG
- ✓ ONBOARDING TAKES TOO LONG & IS A DAUNTING TASK
- ✓ IDENTIFYING SCOPE OF WORK AND NOT STRAYING FROM IT
- ✓ 100% OVERWHELMED AND NO IDEA WHERE TO BEGIN

MANY CHALLENGES OF THE SOLOPRENEUR



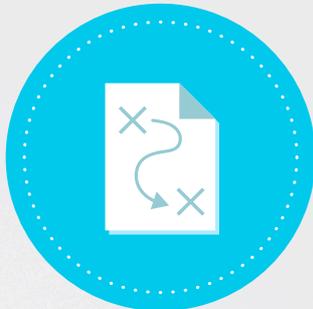
ONLY SO MANY HOURS IN A DAY

Whether you are trying to get a side-business off the ground or growing your existing practice, there is fine line between “doing client work” and growing the business. With a finite number of hours, it can be hard to figure out how to prioritize or get it all done.



NEED A DIFFERENT PERSPECTIVE

While the solopreneur life can be rewarding, it can also feel be very isolating. Coaching can provide the sounding board for our ideas, an accountability partner or a new viewpoint.

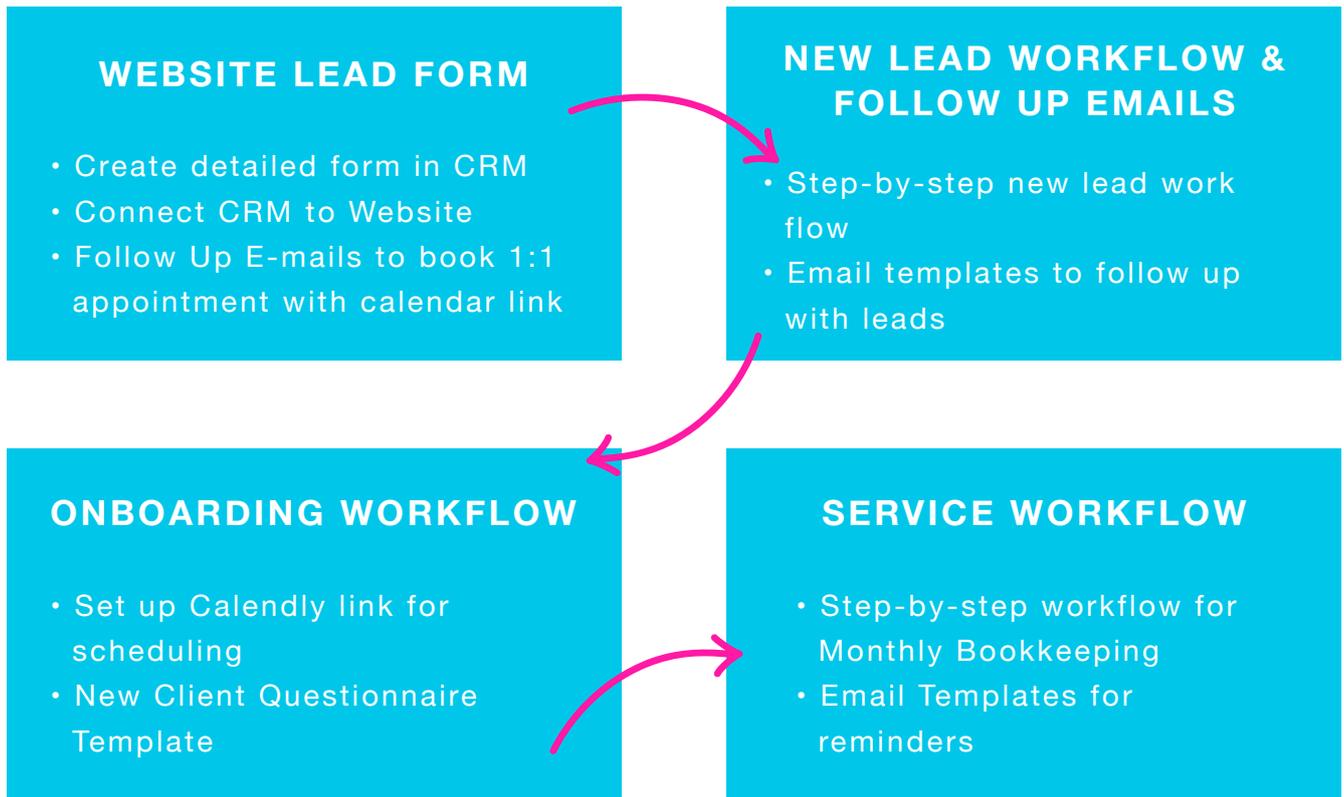


INEFFICIENT PROCESSES

Without optimized processes and software tools in place, things can take twice as long as they should. Setting up automation while doing client work can be quite challenging.



4 ESSENTIAL WORKFLOWS TO JUMPSTART YOUR BOOKKEEPING BUSINESS



Workflows tell you what you need to do and the systems are what keep you on track.

And when you have them working together, they can set you up for success and **KEEP YOU THERE by...**

- ✓ Saving you time with effective processes
- ✓ Giving your clients a better experience with no surprises
- ✓ Making processes like onboarding seamless and streamlined

The above workflows are absolutely essential to getting an efficient bookkeeping business started. Having these 4 systems dialed in will allow you space to grow your business. Of course, that's not the only system you need but it is a good start.

HOW CAN YOU GET YOUR BOOKKEEPING BUSINESS THRIVING?

As I work with accounting professionals, there are 3 important steps that we work through to get them set up for success and freedom in their business. Those steps are:



360-DEGREE REVIEW

My goal is to help every new bookkeeping firm become systemized and organized. We start by discussing current processes, client interactions and systems. Next, we review existing calendar of personal and business commitments, their desired timeline, and the cash available to invest in their business.



RECOMMEND TIME-SAVING APPS

After evaluating a practice, I recommend systems to help automate and organize it based on the identified niche, business size, business model and the available time the owner has to work on and in their business.



AUTOMATE WORKFLOWS

Using the Number Nerd Bookkeeping Templates, we set up and customize a variety of workflows in the new software so all of the onboarding, sales and follow-up processes work seamlessly.



LET ME HELP YOU FIND THE SAME FREEDOM AS MY CFO CLIENT

Having your own bookkeeping business can be so rewarding, but it also takes a lot of blood, sweat and tears. I've been there and done that as I've grown Number Nerd Bookkeeping Solutions to the 6-figure business it is today. It has been challenging and rewarding and such an amazing learning experience that I can't imagine going back to a regular 9-5 job.

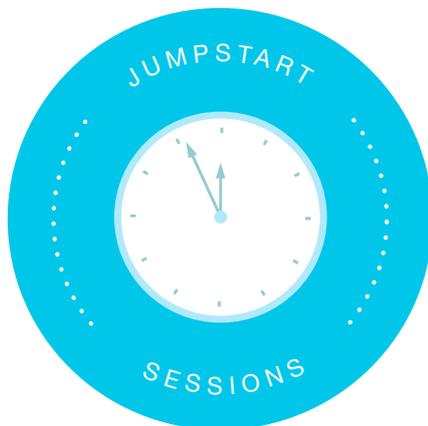
I want to help you along that same path to success. I've created the following offerings to help you get your bookkeeping business started and thriving:



This is my signature course, where I take you through the same steps as my CFO client to evaluate, optimize, and systemize your bookkeeping business.

The Number Nerd Template Lab is your roadmap to starting and running your bookkeeping business with less stress, happier clients, and more time for what matters to you.

[LEARN MORE](#)



A 90-minute one-on-one session with me to provide expert advice on specific business challenges you're facing— from tackling workflows to pricing to general guidance.

This is perfect for bookkeepers who know they need help but not sure where to start or you know that you need to get out of your own head and find a different perspective.

[LEARN MORE](#)



Our template library was built for the bookkeeping professional who is ready to get serious about managing their workload, so they can scale their business and grow their bottom line. Each template in the Template Shop is tried and tested many times over by our team and clients.

Visit the Template Shop to find the templates, contracts, workflows, questionnaires, and emails you need to start to streamline your business so you can save time and frustration in any project.

[LEARN MORE](#)

ABOUT HEATHER

Business Coach + Strategist

**Chief Number Nerd at
Number Nerd Bookkeeping Solutions LLC**

With over 26 years of experience managing, training and advising service-based and product-based businesses spanning across many industries: consulting, clothing, comic books, fitness, legal, and SAAS, to name a few. Heather opened her own firm, Number Nerd Bookkeeping Solutions, LLC in 2015.

Between her obsession with finding a better way to do things and her love of productivity apps, she established and perfected bookkeeping workflows and templates for other small businesses.

She is motivated to help other businesses increase their bottom line by becoming more efficient and productive by implementing tried and true workflow templates that do just that!



**OUR GOAL: SYSTEMIZE YOUR
BUSINESS SO YOU GET BACK YOUR TIME!**

My goal is to systemize and organize your business to give you back your time! Whether you want time back for your personal life or more time to work on your business, I want to eliminate your feeling of being "overwhelmed" when taking on new clients, onboarding and managing your workload one workflow at a time.

With the right systems and processes in place, your business will take off!

LET'S GET STARTED!