

Sidekick Unwrapped-Day 1

9.00 Welcome – Viv Brownrigg

9.15 Session 1. A breath of fresh air in Accounting – Dave Jessep

- djca - A start up business
- How we developed our business
- The importance of our sales and marketing team
- 24 Months - \$1.4m in new business
- Our employment mantra
- The Cloud mindset
- How important is a system for growth
- Our internal budgeting tool explained
- Q & A

10.30 Morning Tea

11.00 Session 2: Meet Sidekick – Dave Jessep

- Sidekick explained (Our Brand = Our objectives + Our Values + Our Culture + Our ideal target market)
- Focus on looking forwards rather than backwards
- How Xero allows you to deliver more for less
- What that means for the SME
- How our packages compare – bundled services explained
- On-boarding & training
- Charging for the current year
- Dealing with client expectations
- Our Sidekick Accountants
- Allocation of clients
- Q & A

13.00 Lunch

14.00 Session 3: Marketing & Sales Growth – Dave Jessep

- Website, twitter, blog and facebook – how it fits together and needs to be consistent
- Social media – Why it is so important and how we manage it on a day to day basis
- 11 Marketing Fundamentals
- Marketing & sales role - how this works and why is it so crucial
- How the sales system works for a professional services firm
- Why marketing & sales is just a numbers game
- How you find a good business development executive – what attributes are important
- How you motivate a business development executive
- The systems we use – Salesforce, Workflowmax, Xero, Debtor Daddy, Box
- Key tools to use (Google analytics, email campaigns, integrated SM channels.)
- Q & A

15.30 Afternoon Tea

16.00 Session 4: Applying Sidekick to your firm – Dave Jessep

- Who is your Sidekick?
- What must your brand represent?
- Redesign our brochure with your firm in mind
- Q & A

17.00 Drinks



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hours**

Sidekick Unwrapped-Day 2

9.00 Session 5 – The Financial Coach – Viv Brownrigg

- What clients want, and aren't getting
- Your role as Financial Coach
- Financial Coach deliverables
- Delivery at face to face and screen to screen meetings
- Q & A

10.30 Morning Tea

11.00 Session 6: Detailing the djca processes – Dave Jessep

- The sales process in detail – how does it work?
- Why accountants must be involved before closing the sale
- The new client form – ensuring the client fit
- Getting the information correct - our engagement/proposal form
- Our client on-boarding process - assignment of this crucial role
- Explaining our on-boarding process
- Outsourced new client training – our step by step training guide
- Previous years accounts and year to date information – Livemigrate Ltd
- Hand over to the Sidekick Accountant
- Delivering the bundled services, our senior/junior accounting teams
- Q & A

13.00 Lunch

14.00 Session 7: Applying it to your business – Dave Jessep

- Creating a Xero Start Up in your firm
- Bringing on board the right team
 - Your Sidekick accountant
 - Accounting Intermediate
 - Business Development Manager
- Getting the documents and systems implemented
- Applying and learning the workflow processes
- Delivering the bundled services
 - Time and billing budgets
 - Monthly job objectives

15.30 Afternoon Tea

16.00 Session 8: Your growth goals? – Dave Jessep

- Identifying where you would like to be by the end of the calendar year/Xero ranking goal for 12 months
- Your next 5 key action steps
- Implementation support
- Summary of key messages
- Q & A

17.00 End



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