

Increase your profitability as a Solopreneur QuickBooks consultant- **How to Create Your Discovery Session Evaluation Chart**

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WHAT tasks to reorganize, automate and outsource

It's
Time!



It's TIME to schedule a meeting with yourself!
Focus on your WHY & ask questions that will evaluate your priority tasks & the current resources available to support them

- Have you decided on primary service offerings?
- Can you service these offerings alone or will they require staff and/or contractors?
- Will your firm be 100% virtual?
- Will you be specializing on a Niche market?
- Have you considering passive income stream activities?
- Have you considered partnerships to provide additional value-added services?

List top priority tasks

01

Create an organized workflow that provides for a focused work environment & quick access to daily tasks and company resources

04

Create a collaborative workspace and assign workflows for client & strategic partnership projects

02

Choosing the best online accounting & tax solution that can be utilized for BOTH clients and the firm

05

Create loyal customer evangelists & a strong niche community by providing a targeted service/product to solve an ongoing customer pain point

03

Become a 100% virtual practice including all company-wide solutions

06

Capturing leads and converting clients through an automated & personalized experience

**Assign Your Tasks based on the most efficient resources available:
Reorganize, automate and/or outsource**

Discovery session evaluation chart (Example)

HOW will task management reduce costs, create efficiencies & increase profits!

What are YOUR tasks?	Reorganize for YOU to do	Automate for BOTS to do	Outsource for OTHERS to do
<p>Create an organized workflow that provides for a focused work environment & quick access to daily tasks and company resources</p>	<p>The process of reorganizing all daily tasks & related resources into a folder-based project workflow allows for a focus-driven workspace with quick access to priority tasks, related tools and less down-time working on admin tasks and more time on income- generating tasks</p>	<p>Chrome Bookmarks: hierarchy of folders based on workflows, tasks & resources that follow you everywhere and are searchable Momentum: allow yourself to stay accountable & focused on one task Pomodora: Utilize a productivity tool to complete big jobs in small bites BoomerangGmail: Keep Inbox clean by responding at appropriate times</p>	<p>Separate browser users will recreate your workflows across additional staff and/or contracted service to create efficiencies company-wide</p>
<p>Accounting & tax solution that can be utilized for BOTH clients & firm</p>	<p>Using a “One-Space” dashboard solution for accounting & tax services reduces software costs, reduces data access down-time, allows for streamline data transfer from books to tax return and allows for easier software training and company-wide best practices (i.e. Utilizing QBOA + QBO and/or QBSE + PTO/Link)</p>	<p>QBO: bank feeds, bank rules, scheduled invoices QBSE: estimated tax payment notifications PTO: Dashboard for real-time tax prep/e-file status Link: Tax Docs collection with status notifications</p>	<p>Utilize a consistent set of solutions for easier software cross-training & multi-user access to be ready for when additional staff and/or contracted services are required for larger client base</p>
<p>Task 3...</p>			

Were you listening?

GOOD!!!

Now it's YOUR turn!



Increase your profitability as a Solopreneur QuickBooks Consultant
List TOP priority tasks

01

02

03

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#QBConnect



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