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Mar. 11, 2022



By Jasen Stine.

Jody Grunden, co-founder and CEO of Summit CPA, has more than 20 years of experience and has helped pioneer innovative changes within the accounting profession. Summit CPA is now a 9 million dollar firm, and Grunden recently shared

how his team got where they are today, including steps other small business owners

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In addition to how his firm dressed, he made the culture fixes he wanted to make, including making sure his employees weren't putting in 80 hour work weeks during tax season. He figured out why tax and accounting professionals hated how they were billing and changed it to fit his employee's wants and needs. He made a conscious effort to change that at his firm by investing in the right technology and changing the way his employees and their clients worked. There were bumps along the way, but by staying true to what he wanted to see in a firm, he created a culture and a firm where people want to work.

Build your own Model

Jody and his team worked on a model that was all their own and fit the needs of their clients and employees. In 2013 they were able to fine tune their hybrid workforce by working in person and also meeting with clients virtually. At first it seemed impossible, but once people got used to it, they started to see more positive aspects of being virtual.

Doing more work virtually allowed them to scale their services by cutting commute time, increasing their recruiting to the entire country, and more. His company figured out how to work remotely, and how to work with clients remotely, even before the pandemic, which has worked extremely well for their business.

Build Relationships and Connect with People

At the end of the day, it's not about the forms or forecasting or numbers. While this is important, client's want to know you have their goals and dreams in mind and not just the numbers. Relating to your clients, helping them come up with ideas, and advising them to think differently is instrumental in building a client base and maintaining relationships.

Sometimes bringing new services and pricing to clients can be challenging, but

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Intuit invests a lot in technology and the people that monitor it and introduce it. They are quick to make a change because what was great five years ago, may not still be great today. You can't make changes for change's sake, but you need to stay nimble and keep your ear to the ground on what's new and upcoming and how it can help build or reform your business.

Remember to be open to pulling the trigger and making the changes to solve a problem.

Take the risk and make the change

You can make the changes you want for your business without sacrificing the bottom line, and you can continue to grow, even if it's contrary to the norm. Making changes is part of the process and being open to failure is empowering. Not everything will go the way you anticipate it – even Jody's team had to try many different iterations before figuring it out, but eventually got to where they are today.

Businesses are continually evolving, which we've seen even more amid the pandemic. When looking to change or adapt, trust your instincts and build a business you're proud of and that those working for you can be proud of as well. Taking a risk can be intimidating, but it can also pay off in the long run.

You can hear from Jody, find more resources and learn how to build a multimillion-dollar firm on a recent episode of Intuit's AccounTrends, [here](#).

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Jasen Stine is tax and accounting education leader at Intuit.

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