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operate using bite-sized benchmarking. These benchmarks help you ignite a revolution of recurring revenue, target clients, and saying goodbye forever to unhealthy hours – while increasing profitability.

Nov. 17, 2023



This webinar was held on Tuesday, December 12, 2023.

Sponsor: Canopy

Duration: 1 Hour

[View the Archived Webinar](#)

The writing is on the wall. The standard business model for accounting firms is reactive and transactional – and it's on life support. There is a better way: set goals

that seek to drive hours down and drive profits up while setting sane deadlines.

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transform your life.

Renew will demonstrate the above with practical, real-life success stories. Renew has helped hundreds of accounting firms increase their number of target clients, focusing on inspiring metrics and work while making a significant impact with their clients.

Join this hard-hitting and practical webinar and learn proven strategies to eliminate the tax season pit in your stomach and transform your firm – once and for all.


Learning Objectives:

- Learn how one firm doubled their average client revenue without working more hours.
- Learn how one firm now has subscription revenue greater than \$1M.
- Recognize why putting too much emphasis on hours drives down team morale and doesn't create more value for clients.
- Learn how to easily implement new client metrics to focus on the right clients, drive value to them, and stop giving away access and working for free.
- Learn how to get clarity and know exactly where you are getting leverage in your firm. We will dig into the only 3 places firms can obtain leverage and how this is critical to managing quality of life.
- Learn how establish new business model metrics in your firm. Learn how to analyze your firm based on our Pareto for Profit.TM

Program level: Basic (no prerequisites required).

Field of Study: Business Management and Organization

Presented by



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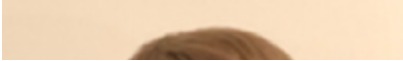
working with accountants to provide them with the tools they need to develop and implement strategies to build better firms.

After spending nearly 10 years in a business advisory capacity in a fast-growing UK firm, Colin has spent over 25 years creating content for accountants, coaching accountants, and providing communities to enable accountants to collaborate so that they do not have to reinvent the wheel.

Colin has developed software, content, products, and systems to enable accountants to grow their firms, improve profitability, attract better clients, and reduce the insanity of tax season. He regularly speaks on these topics and passionately believes that accountants can transform their firms and their lives by providing truly valuable services for the right clients.

Colin is a Co-Founder of Renew Group. Renew Group's mission is to transform accounting firms and the lives of their professionals. Through their Firm Transformation FrameworkTM, Renew Group provides accountants with the education, tools, community, and coaching needed to create better business models. They are dedicated to revolutionizing the accounting industry, one firm at a time, by delivering tangible, life-changing results.

Colin loves helping accountants design firms that work for them, so that they can spend more time with their families and pursuing hobbies and leisure interests.



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accountants in various capacities. His career began at KPMG in San Francisco. Shannon moved on to specialize in high-net-worth individuals and emerging growth business for two well-known San Francisco-based regional accounting firms. Shannon then spent six years at RANONE, an international consulting company, with two years as the Chief Operating Officer of a 10MM business unit.

Since 2001, Shannon has consulted with Top 100 firms to Sole Practitioners, helping them create sustainable and profitable businesses.

He empowers accountants to transform their firms and lives through the systems, software, and content he creates. This transformation enables accountants to streamline their operations, improve profitability, draw in the right clients, and remove the chaos of tax season. Shannon is an avid speaker on these subjects and is relentless in the pursuit of helping accounting firms have a better business model and a better life.

Shannon is a Co-Founder and CEO of Renew Group, whose mission is to transform accounting firms and the lives of their professionals. Through their Firm Transformation Framework™, Renew Group provides accountants with the education, tools, community, and coaching needed to create better business models. They are dedicated to revolutionizing the accounting industry, one firm at a time, by delivering tangible, life-changing results.

Shannon earned a bachelor's degree in economics with an emphasis in accounting from the University of California, Santa Barbara, and now resides in the San Francisco Bay Area with his wife Jackie.



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Jean Faddano Fear is the founder and principal of Jean Faddano Fear, CPA, PLLC d/b/a Accounting For All. Jean graduated from SUNY Geneseo with a Bachelor of Science in Accounting in 1984 and passed the Certified Public Accounting exam in 1987.

Jean obtained her CPA license during her three years working for a local public accounting firm in Albany, N.Y. She then went on to work for Computer Sciences Corporation (CSC) as part of their Internal Audit team. The local CSC office is the fiscal agent for the New York State Medicaid program.

In addition to her work on the Medicaid contract, Jean assisted the CSC Corporate Internal Audit staff on numerous national and international assignments.

During her time at CSC, Jean began to build her private accounting practice on a part-time basis. Before too long it became apparent her practice was rapidly developing into a full-time commitment, leading Jean to leave CSC in January 1996 in order to fully dedicate herself to her expanding list of clients.

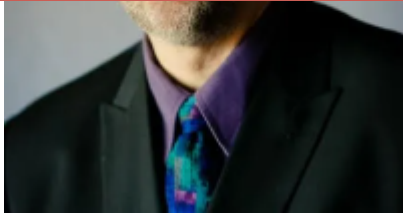
Jean's practice has grown over the years primarily through client referrals. She now has a client base of approximately 500 individual and small business accounts. As a growing business in New York's Capital Region today, Jean and the Accounting For All staff thoroughly understand the needs of their clients and enjoy helping fellow entrepreneurs with their various accounting needs.

Jean is a member in good standing of the AICPA and its Peer Review Program and the New York State Society of CPAs. She is a Certified QuickBooks Pro Advisor.

A resident of the Capital Region since grammar school, Jean is an avid

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Larry Teal graduated from Siena College with a Bachelor of Science in Business Administration in 1983 (Accounting Major) and passed the Certified Public Accountant exam in 1986.

Larry spent the first nine years of his career refining his accounting and business management skills in private industry, mainly with manufacturing and wholesale distribution companies. During this period he honed his skills in cost accounting, inventory control and management accounting across various manufacturing platforms. In the position of Controller at several companies, Larry's main focus was on restoring the businesses to good credit standing by managing assets and inventory to improve cash flow.

One of Larry's most stimulating positions was as Special Project Manager of Mergers and Acquisitions for Sofco, Inc. In that role he was instrumental in the acquisition and operational restructuring of a \$50 million paper distribution company. Larry also had the unique experience of leading a wholesale food distributor through Chapter 11 bankruptcy reorganization.

Larry spent the next nine years of his career in the software development and telecom industry. In 1992, he joined Commsoft, a telecom customer care and billing software developer, as a software engineer focused on the accounting and inventory modules. At the same time he was expanding his software engineering skills, Larry contributed his business knowledge and experience in helping to

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small- and medium-sized businesses through his public accounting practice at Accounting For All. A certified QuickBooks Pro Advisor since 1999, Larry's main focus is on supporting Tech Valley companies in their accounting, tax and QuickBooks consulting needs. Larry is a life-long resident of the Capital Region, an avid skier and golfer and an active supporter of the Capital District Chapter of the Crohn's and Colitis Foundation of America.



Gail Perry, CPA, is the editor-in-chief of *CPA Practice Advisor*. A veteran of accounting journalism, she also speaks at many accounting events, trade shows, and webinars. Gail is the author of over 30 books (including *Mint.com For Dummies*, *The Idiot's Guide to Introductory Accounting*, and *Surviving Financial Downsizing: A Practical Guide to Living Well on Less Income*), and she maintains a small tax practice. Gail is a graduate of Indiana University where she earned a bachelor's degree in journalism. She returned to school to study accounting at Illinois State University, earned her CPA, and worked for Deloitte in Chicago for several years as a state and local tax accountant. She has taught introductory accounting and personal finance courses, and she

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Canopy unlocks the firm you always wanted. AND WE DO THIS BY...Unclunking accounting firms with an end-to-end solution that makes your tech stack less...stack-y. Putting our customers first with world-class user experience, support, education, and innovation rooted in customer feedback. Working (and working well) anywhere for any size or type of firm—wherever you are now and wherever you're going. Multiplying your efforts so your practice requires less proverbial midnight oil. Delighting your clients with a modern, easy-to-use portal that helps you get the info you need when you need it.

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