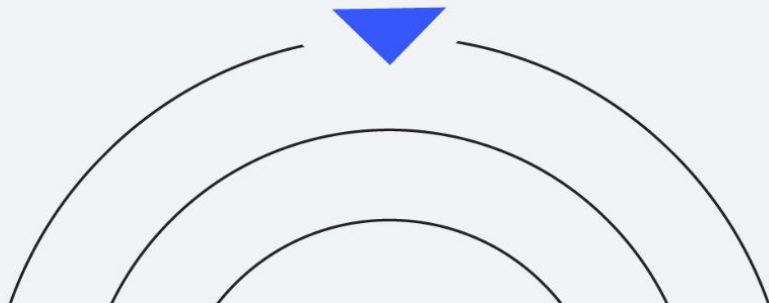canopy

FROM AVERAGE TO EXCELLENT:

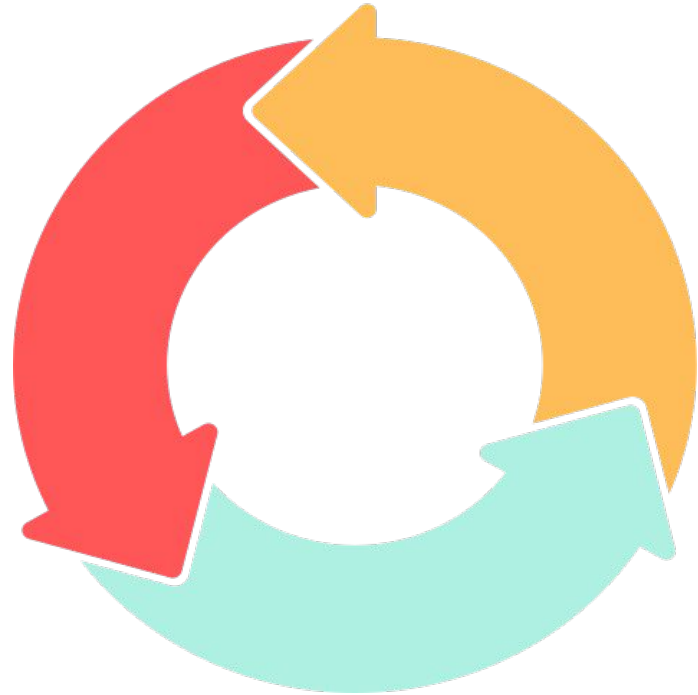# 3 Steps to Building a Team That Scales with Your Firm

*1 CPE Credit

Speaker: Terrell Turner, CPA

Co-Founder, TLTurner Group

Why This Matters

❖ L1 – Talent Factor

❖ L2 – Leadership Factor

❖ L3 – Resource Factor

Terrell A. Turner, CPA

- 3x – 40 under 40 CPA
- 2x – Global Finance Influencer
- Content Creator
- Law Firm Finance Chair – ABA
- Bestest Uncle in the World

Objectives

Discover

How to identify the PERFECT staff for your firm.
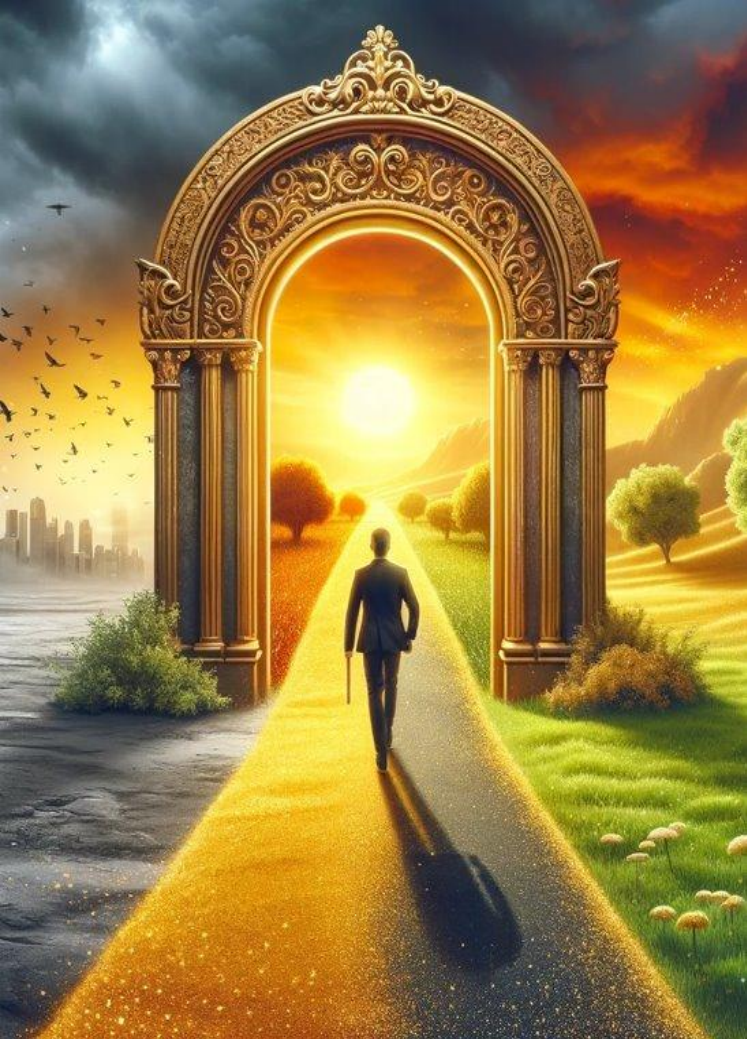
Describe

The process for building an effective performance scorecard.

Discuss

Ways to use AI to speed up your team's development and growth.

Finding Perfect

Why Firms Avoid Perfection

- They think it's not obtainable

- They think it's too expensive

- They think it takes too long to find

Finding Perfect Talent

- Skills

- Attitude

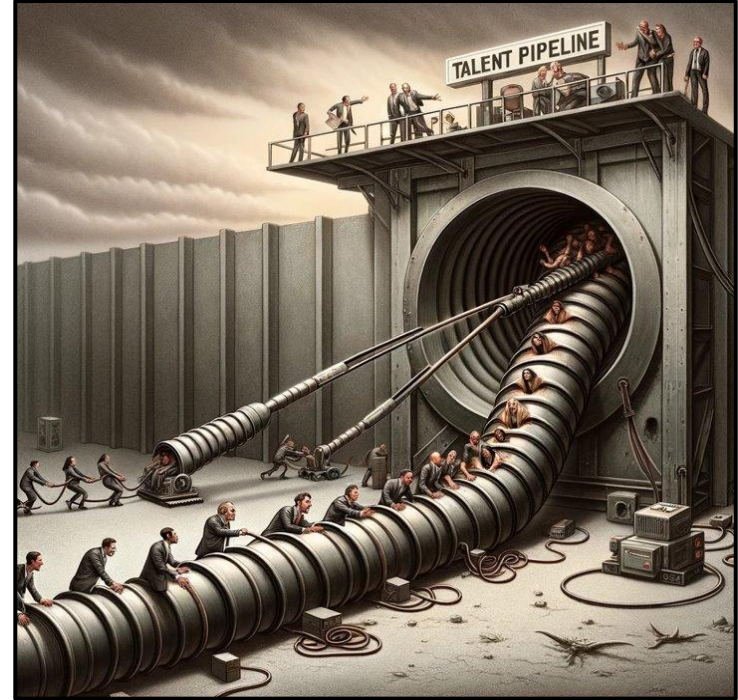- Values

- Geography

- Availability

Bookkeeper Skills Example

Skill	What "Perfect" looks like
Technical Skills	Able to map out debits, credits and able to explain how transactions impact the results of the financial statements
Analytical Skills	Can track & spot missing expenses based on analyzing historical trends in the financial data
Business Accumen	Understand who their client is and what their client does (industry, pain points, goals, size, # of employees, location)
Technology Skills	Can integrate third party tools to make the accounting process more efficient
Self Leadership Skills	Can manage up to 25 clients and proactively work with peers and management to ensure deadlines are not missed
Attitude	Is a joy to work with and gets along with their co-workers

What Is the Benefit

- Clarity for leadership

- Lower turnover cost

- Process of elimination

- Less manager stress

Staff Evaluation

Finding Perfect Talent

- Application Questions

- Video/Voice Note

- Case Studies

- References

Current Staff Comparison

Skill	What "perfect" looks like	How does your current staff compare to perfect
Skill …	Description …….	
Skill …	Description …….	
Skill …	Description …….	
Skill …	Description …….	
Skill …	Description …….	

Staff Development

Growth Opportunity

Help point them toward success

- Pick 5 perfect skills

- Define average, good and excellent

- Monthly performance review meetings

Golden AGE Assessment

Skill	Average	Good	Excellent	Staff Score
Client Capacity	15 client	20 clients	25 clients	
% of Transactions That are Automated	40%	70%	80%+	
Accounting Accuracy	75%	85%	95%+	
On Time Delivery	On time	2 days early	4+ days early	
Client Reporting	Provides some context for CS	Can create the first draft of reporting	Can independently handle this task	

Δ

Operation Momma Bird

- Team Announcement

- Leadership Patience

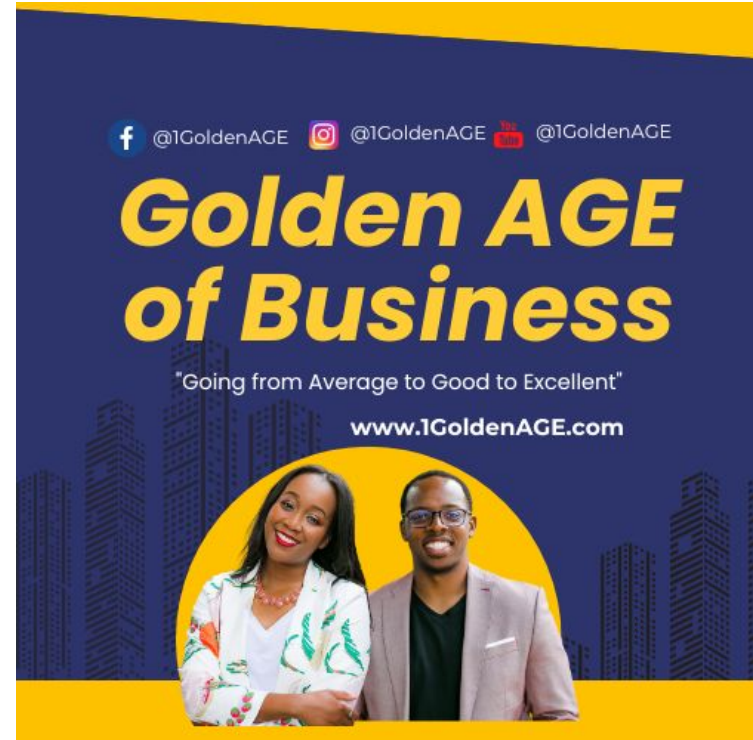- Projects and Plans

- Honest Feedback

How did we use AI to help

- Access to AI tools

- AI security training

- Prompt training

- Tool demonstrations

- Staff led learning

Type	Common AI Prompts
Process Efficiency	If I am trying to improve the efficiency of this bookkeeping process where we take data from this location and enter it into this location; what is a way to automate or make this more efficient?
Advisory Support	If a client in _____ industry, has average monthly revenue of ___, their operating expenses are _____, they have ___ number of employees and have an annual goal of ___. What is some advice that you would give to help them make improvements with the financial performance of their business?
Automation	What tools exist to automate a process that is aimed to do the following (write out the current process and purpose of the process)?
Calculations	Give me a google sheet formula if I am trying to (describe what you are trying to do with google sheets) achieve this outcome.
Research	Give me some explanation of what this transaction might be if a business within this industry _____ and is located in this city _____, has a financial transaction with this memo description?

What to do next

1. Define "Perfection"
2. Evaluate your current staff
3. Set Golden **AGE** Goals
4. Meet with your team regularly

Q & A

THANK YOU

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