

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Serve it up right in 2024

Dear Friends,

This month's email is sponsored by...*breakfast*. I know that isn't that much of a departure from my usual grits-focused themes, but as I prepare for today's [Tool Time](#) class, two of the concepts involve breakfast. First, we're talking about Kaizen and how many of its core principles are brought to life through a video about making toast. Yes, toast! Then we are going to talk about process mapping, using an example based on the steps involved in making breakfast. I'm getting hungry already...

There are a number of lessons in these materials, all part of the [Level 5 training](#), but for me, one of the key ideas has to do with teaching complex topics with simple examples. It is also supported by tip #32 in [my book](#) "Use a bonehead example to teach a brainy process."

For those of us who are used to working in the land of accounting with its unique terminology and multi-tab spreadsheets, finding a way to break down a complex topic into something more easily understood is a great way to refine and clarify our own knowledge. Not to mention, it helps our non-accountant terminology clients understand what in the heck we are talking about. The process of finding an analogy can really be inspiring as it forces you to really see things from a new perspective. That new way of seeing things, by the way, is another concept from Kaizen, they call the perspective shift "having a keen eye". For example, I used a "bonehead" apple tree analogy to explain financial statements in this [SlideShare post](#) which has over

90,000 views (You might also want to fry up some apples for that breakfast of yours, yum.)

So, here's to serving up a great, nutrient-filled breakfast for your clients in 2024!

Don't forget to bring home the bacon, y'all,

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DISC-overing the Science of Communication

Learning how to adapt your message to better resonate with current and prospective clients is *essential* to becoming an advisor. Which is why I am now offering a [single training session](#) that will help you better understand yourself as well as how to communicate with the client in a way that works for them.

What's included:

- [Personal DISC Assessment](#) taken online with your personalized, comprehensive report emailed to you.
- [Live Online Webinar & Debrief](#) that will help you understand your communication style, what it means and how you can leverage DISC in Advisory work with your clients.

My next webinar is scheduled for Thurs., February 29th - 8:30am PST. Whether you have completed the [Level 5 Training](#) or considering it, this session will give you a foundation for working with clients of all kinds. [Sign up here.](#)



Question of the month:

From the Kaizen Event Workbook, in the [Level 5 Training Program](#):

When conducting a process mapping exercise with a team, ask participants, "What are your greatest disappointments around this process?"

The answers you receive will be the basis for deeper inquiry. What outcomes are being delayed? Can we pinpoint the bottlenecks? What goals can we set for improvement and what can we measure to show progress?



Upcoming speaking events:

1/24 Online: Tool Time 2.0

**Available to current Level 5 Students & Graduates only, [requires subscription](#).*

2/13 Online: I Talk Tech - LinkedIn Live with Joshua Bone

2/28 Online: Tool Time 2.0

**Available to current Level 5 Students & Graduates only, [requires subscription](#).*

9/25 Online: Insightful Accountant Future Forward



Listen Up!

I had the pleasure of joining [Brannon Poe](#) Founder of Poe Group Advisors and Host of the [Accountant's Flight Plan Podcast](#). What a treat to not only talk about Advisory, but to learn more about what his team at [Poe Group Advisors](#) offers CPA firms in buying, growing and selling their practice.

Check out the full podcast here: [Unlocking the Magic of Advisory Opportunities for Accountants](#)



STEM Grits

GRIT means many things to many people, but I love this definition built around technology for women. It's called: *Girls Re-Imagining Tomorrow (GRIT)*. Check out what this particular STEM program is accomplishing across the US: [ePlus Welcomes New Class of GRIT -- Girls Re-Imagining Tomorrow -- Participants](#)

Making an Impact

I recently received an email from one of my [Level 5](#) graduates that I printed off and pinned up in my office for the purpose of putting a smile on my face when I need it.

[Jonathan Godwin, CPA](#) and now Accredited Impactful Advisor informed me that he watched my [Fathom Expert Series: Make an Impact: Practical Tips for High Value Engagement](#). Doing so, gave him the confidence to reach out to two of his clients to set up a [Fathom - Goalseek](#) run through of their business using my Strategies to Action Spreadsheet.

Further he wrote:

"I look forward to learning more from you in 2024. You've made a huge impact on my firm and on my clients this year, so thank you from the bottom of my heart."

This is why I do what I do. Why I dedicate my time to training others in advisory. Talk about making an impact! Jonathan, the sky is the limit for you. Keep up the great work and thank you for sharing your story.

[I want to hear your story - how are you making an impact?](#)



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