

LEAVE YOUR MARK.

THE IMPACTFUL ADVISOR

MAKE AN IMPRESSION.



Unleashing the Power of Technology

Dear Friends,

As I was creating my presentation for next week at [BKX23](#), I started to think about all of the challenges small business owners and their teams have to overcome. By the time the numbers make their way from transactions to the financial statements, the worst is over. All of the challenges in driving sales, managing inventory, and collecting payments have been addressed. *(Well, unless the bank account doesn't reconcile, or you mis-coded that insurance bill to marketing, or made some other tragic accounting error.)*

But here's the thing. By keeping our focus on just the financial reports or the general ledger we are missing opportunities to provide more help. It's the operational systems that hold both challenges and opportunities. We are far too quick to work around that operational system's bad reporting or lack of integration and spend hours manipulating data. Our clients need insights from these systems - NOW. Not after it has been reconciled in the accounting software.

We need to take more time identifying client needs and looking for ways to automate their processes. There are many ways we can help our clients get better and faster insights in these non-financial systems.

[Read my blog post about one solution here.](#)

As always, I wish you all of the furry, slobbery love you can handle,

Geni



Why DIY?

When you sign up for the [Do-It-Yourself training program](#) here is what you can expect:

- A 12- Month subscription to the [online training program](#) for learning at your own pace, on your own time.
- Access to 100's of tools including instructional videos, downloadable slides and licensed documents with guides on how to use them with your clients.
- A [proven methodology](#) created by Edi Osborne for accountants and tested over 20 years.
- Free financing of the \$1800 fee over the first three months.

[Course graduates have changed their practice and seen increased revenues by using just one of the more than 100 tools.](#)

Are you ready to make an impact?



Question of the month:

How passionate and persevering are you? That killer combo is exactly what it takes to acquire and then master any new skill, especially advisory.

Take this oh-so-perfect online "grit" [assessment](#) to find out and then check out the grit podcast below.



Upcoming speaking events:

6/22 Online: Tool Time 2.0

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

6/25 - 6/26 Live: [Scaling New Heights](#)

6/27 Live: [BKX BookKeepers Conference](#) in Dallas, TX

9/21 - 9/23 Live: [Get FREE TICKETS to Botkeepers AI Unchained - Boston, MA](#) using my *Speaker Promo Code: UNCH23SAVEGW* - Come see me!



Grit - what does it take to persevere?

In this [2021 podcast](#) featuring two of my favorite authors, [Brené Brown](#) and [Angela Duckworth](#) they talk about the concept of grit, what it is and what it isn't.

Check it out:

Making an Impact

If you missed yesterday's LinkedIn Live Advisory in Real Life with [Jonathan Godwin](#) of [Godwin & Associates, CPA](#), you missed a great conversation. [Watch it here](#)

Jonathan is currently enrolled in [The Impactful Advisor DIY+ Program](#) where you complete the training at your own pace, having access to materials and tools for 12 months PLUS access to live, once-a-month webinars with me for additional training and support.



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