



SHANNON VINCENT

CPA PROFIT COACHING

CAREER OVERVIEW

Since 2004, Shannon has helped accounting firms increase profitability by at least 30% while reducing client numbers by at least 30% so that they can have more freedom.

CREDENTIALS

- Business Economics (UCSB)
- CPA (Inactive)
- Member California Society of CPAs

CONTACT SHANNON:

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Testimonials: renewgroup.com/testimonials

SPEAKING ENGAGEMENTS

- California Society of CPA's
- Missouri Society of CPA's
- Ohio Society of CPA's
- Moss Adams Network

RENEW GROUP
MAKE IT COUNT



TOPICS

ReNew Your Accounting Firm

A new outlook on running your firm

- Internal value proposition focuses you and your team
- Detailed analysis that provides your firm with an assessment of where the noise comes from, where it's most profitable and where to focus going forward
- Target client definition and path to upgrade current clients with defined services package and premium pricing
- Marketing strategies and plans for going after targets supported by key firm metrics
- Turnkey best practice content and more!

Target the Targets TM

How focusing on target clients will accelerate your ability to create more value for the right stakeholders including yourself

- How to define target clients, how to upgrade existing clients to target clients, how to find more target clients
- How to command premium pricing
- How to define your service offering so you lead with access and advisory not compliance
- How to do this by working smarter
- How to have more fun in your firm
- How to have more freedom in your life

Pareto for Profits TM

Why most accountants work for too little

- How trading dollars to pay the overhead can drive you crazy
- Why large clients can create fragility in your firm
- The Insanity Zone. What is it and how do you deal with it?
- Your Scalable Zone. What is it and how to capitalize on it
- Identifying the risks in your client base and where all your time is going
- Understanding your break-even price

AUDIENCE COMMENTS

The presentation was very well organized, very informative and complete. Shannon was very helpful and oh so timely handling a request from me. Thanks!

Susan McLaurine CPA, Vantage Consulting

Shannon's presentation style is dynamic and engaging. He speaks our language in a clear and memorable style.

3-Partner Firm, Canada

Your presentation was great. It really spoke to the issues the firms are facing. You clearly get it and also know the battles they face on a day-to-day basis. Great how to's.

Ryan Cook, CEO, CPAs + Wealth Management