



2024

Speaking &  
Facilitation  
Guide

Interactive & Engaging Sessions

Designed Specifically For The Accounting Profession

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the  
**VISIONARY**  
group

# Examples of 2023 Speaking Engagements



# What To Expect

## We Enable Professionals To:

- Adapt to industry changes
- Increase profitability
- Build their firm's value

## Live Events

We engage with the audience and bring them into the conversation.

## Webinars

We monitor the chat and Q&A and answer questions in real-time to make it as engaging as possible.

## Customized Sessions

Times are adjustable. We can create new sessions based on your needs.

# Topics

## Hot for 2024

- Building the Revenue per Professional Head (RPH) of a CPA Firm
- How and Why to Disrupt Your CPA Firm
- The Details and Cash Flow of a PE vs Traditional M&A Deal
- Assessing and Structuring a Successful Internal Succession

## Often Requested

- State of The Accounting Profession
- Building The Enterprise Value of a CPA Firm
- How to Value Price and Shed Non-Performing Clients
- How to Increase an Accounting Firm's Capacity

## Special Focus: A Deep Dive Into a Specific Area

- Critical Client Management Tactics to Create Exceptional Relationships
- Creating a Transition Niche to Support Clients Who Need to Sell
- Setting Goals that Create Breakthrough Ideas
- Educating + Motivating Young Professionals
- Is Your Firm or Client a Private Equity Candidate?

# No Selling Guarantee. No Speaker Fees.

**Selling.** We never sell when presenting or facilitating. Discussions are interactive and educational.

**Fees.** The only costs are for travel expenses at conferences where we speak in person. We do not charge a speaker's fee for those types of sessions. Webinars are of course at no cost.

# Creative Planning Workshops & Assessments For Your Society, Association, & Member Firms

## Specialty Sessions

### Managing Partner Roundtables & Firm Retreats

- **Associations.** We facilitate meetings on M&A, private equity, succession, value pricing, culling clients, advisory services, and the metrics that build the enterprise value of a firm.
- **State Societies.** We can create MP roundtables for small to mid-size firms who want peer interaction structured discussions on growth, staffing, pricing, and overall management of their practices.

### Market Value Accelerator (MVA)

- **Setting Direction.** This is our proprietary process to help accounting firms develop a roadmap to determine their next steps. The MVA includes surveys, interviews, and a deep dive into critical financial metrics.

### Planning Retreats for Your Association or Society

- **Future Offerings.** What do your members need moving forward? We speak with a thousand-plus firms annually who share their ideas, obstacles, and concerns. We can bring those insights into your organization to help plan events and educational sessions to increase member value.

## Training Tracks

Technical programs are abundant but training on how to sell, price, create a succession, become a partner, and other business skills are often missing or delivered by consultants who are not immersed in the accounting profession.

Our training is delivered by professionals who exclusively work with accountants.

## A Series of Suites

Inside each suite is a series of courses that drill deeply into a key firm need.

- M&A Suite
- Succession & Partnership Suite
- Practice Management Suite
- Client Management Suite
- Young Professionals Suite

## Virtual and On-Demand Training

### Three Different Levels

Training tracks to help from firm leadership to new professionals. Each track is specific to the needs and stages of a professional's career.

A firm can select all levels, one level, or just one course.

- Partner / Principal
- Director / Manager
- Professional Staff

### White-Label is an Option

Your organization can offer this training to your members using Visionary's systems and take a revenue share, or you can white-label the training and offer it on your website.

Contact us for the complete training course suite details.

## Hot for 2024

### **Building the Revenue per Professional Head (RPH) of a CPA Firm**

The RPH session shows participants how to use key metrics to build firm value. They will learn how “A-level” metrics drive actions that impact growth, profitability, staff retention, and position firms for M&A activity, sustainability, and succession.

### **How and Why to Disrupt Your CPA Firm**

Should you be making an adapt or die decision? Is succession a concern? Do you need to make investments in technology, people, and advisory? We will explore how disruption may be an essential element to the success of a firm and its clients.

### **The Details and Cash Flow of a PE vs Traditional M&A Deal**

What is the financial impact of each deal type? Participants will learn what to look for when acquiring, merging, or selling. We will show you what makes a firm attractive, how to calculate firm value, detail cash drivers, and build a realistic decision model.

### **Assessing and Structuring a Successful Internal Succession**

One M&A driver is the lack of a succession team or a failed succession. Participants will understand how to assess if a succession is viable, how to develop a blueprint, expose gaps, and explain the timelines, or if they need to merge or sell.

## Often Requested

### **State of the Accounting Profession**

Is your firm at an inflection point? The session will discuss opportunities, challenges, and how to grow sustainable, culture-rich firms that are attractive to staff. We will explain the drivers fueling firm M&A, succession, and how to build firm value.

### **Building the Enterprise Value of a CPA Firm**

At least one of four areas impact every firm: Succession, Capacity, Advisory, and M&A. We address them in order because failure in any one may force M&A. We will review opportunities, risks, metrics, and discuss what other firms have experienced.

### **How to Value Price and Shed Non-Performing Clients**

Pricing is a weakness in many firms. Often, low pricing is a result of limited selling skills. This session will show participants how to value price, handle fee objections, and determine which clients to continue to support.

### **How to Increase an Accounting Firm's Capacity**

How can a firm be less dependent on CPAs? Fewer students are entering accounting while Boomers are exiting. We will show participants how to increase capacity by value pricing, client analysis, outsourcing, and adding “smart” advisory services.

## Special Focus: A Deep Dive Into a Specific Area

### **Critical Client Management Tactics to Create Exceptional Relationships**

Who are your top clients, prospects, and referral sources and what do you know about them? This session will show you how to understand their goals and how to communicate with them to create a deeper bond.

### **Creating a Transition Niche to Support Clients Who Need to Sell**

The transfer of wealth and the sale of businesses will be at a record high. Every firm has clients who need to exit. This session will show firms how to monetize this process and add significant client value.

### **Setting Goals that Create Breakthrough Ideas**

Goals can be motivational or a punishment. This session will show firms how to turn goal setting into an innovative process.

### **Is Your Firm or Client a Private Equity Candidate?**

This session will explore private equity in accounting and how it can impact a client's exit strategies.

### **Educating + Motivating Young Professionals**

This session will show staff how firms work and why this industry is a tremendous career.

## Bob Lewis

Bob is one of Accounting Today's Top 100 Most Influential People, boasting an extensive 25+ years of dedication supporting accounting firm innovation and growth. He is trusted by many of the top firms as well as countless emerging practices. Bob's primary focus revolves around amplifying the direction of CPA firms by leveraging a blend of mergers and acquisitions, succession assessments, capacity expansion, and bolstering a firm's advisory service capabilities. His guidance helps build firm value.

For firms interested in M&A, Bob identifies transition opportunities for clients looking to acquire and firms who want to sell. He is experienced in navigating private equity considerations, deal structuring, and negotiating M&A transactions, and partner buy-ins/buy-outs. He is a nationally sought-after speaker focused on accounting firm innovation and shaping the trajectory of the CPA profession.



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## Doug Lewis

Doug is one of Accounting Today's Top 100 Most Influential "Ones to Watch". He oversees Visionary's M&A department and is bridging the gap between the existing and next generation of leadership inside accounting firms nationwide. At the heart of his role is the facilitation and structuring of fair M&A transactions for both sides in any deal and bringing a fresh perspective on how to create a contemporary firm of the future.

He's known for building strong relationships with industry leaders, fostering innovative approaches in M&A activities, and cultivating a network of trusted consultants and advisors. Doug is a frequent speaker and facilitator in the accounting world, discussing CPA M&A, firm capacity, pricing, and the shift to advisory.



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SUPPORTING THE CPA PROFESSION



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# Why The Visionary Group

We are advisors to the profession and leaders in CPA + Accounting firm mergers, acquisitions, and succession. Our leadership is recognized as one of Accounting Today's Top 100 Most Influential People.

- CPA M&A Search + Consulting Team
- Internal Succession Assessments
- Fractional COO, CMO + Advisory Officer Roles
- Capacity Expansion + Growth Realignment
- Value Pricing + Client Upscaling
- Expanding Advisory Services
- Partnership Agreements, Buy-ins + Comp
- Cutting Edge Development Skill Training Expertise
- Managing Partner Roundtables + Retreats

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