

THE IMPACTFUL ADVISOR



*An update
from Geni*



Milestones and Measures

Dear Friends,

Well, here we are facing the end of the third quarter. Now is the time to check in with your clients and see how they are doing. Are they on track to achieve their financial goals? Where do they go to monitor their progress? What are their plans to create a strong last quarter? How have they managed to survive the on-again, off-again impact of Covid?

For most of my clients, it is a real struggle to get good information fast enough. Their systems provide plenty of data but very few actionable insights. That makes it very hard to make good decisions and even harder to change direction when the market shifts.

Owners, leaders, and employees need to have timely visibility into the business. They need to be able to gauge their progress as they go and not just at the end of the month. Just like weary travelers, they need milestones they can view as they move towards their destination. While accounting data is useful, most milestones

do not come from accounting software - they reside in the operational systems that we seldom see.

Start the fourth quarter off right by sitting down with your clients and walking through all of their systems. Ask them what information resides where and how it flows from one system to another. (If it isn't documented, there's your first client engagement.) In the Level 5 methodology, we offer tools like the **Inventory of Information Systems** that guide you through the discovery process.

My next milestone is my September birthday, which tells me I am on track for getting old (and eligible to start drawing Social Security - Yikes!). How about you? What milestones tell you if you are on track?

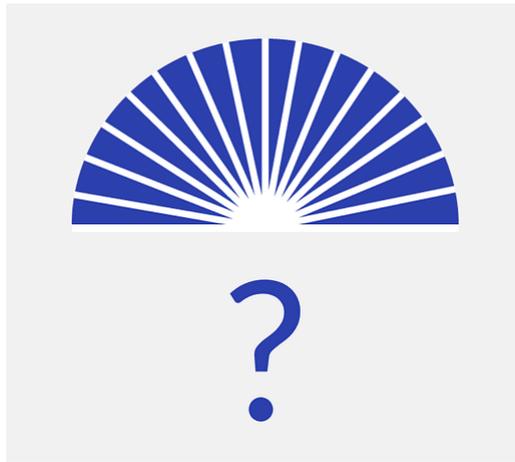
Keep moving forward and help those clients of yours do the same,

Geni



Last Cohort of 2021!

Let's change the way you work and make an impact for your clients! **Starting in mid-October**, I will be hosting the [last 2021 Cohort of the year](#). We'll meet regularly to walk through the materials in the [Level 5 Advisor Certification](#) and I will share my insights from my own client work and how I have applied these tools. Join my [group learning](#) option by October 1st!



Question of the month

"What is your go-to metric, measure, or report for checking your daily progress towards financial goals?"

Ask your clients and members of their leadership team how they gauge their success. If they can't answer the question, they need your help. If they can answer the question, but it involves an Excel spreadsheet, they need your help.



Upcoming speaking events:

9/24: [Stop Hounding Your Clients: There Is A Better Way](#)

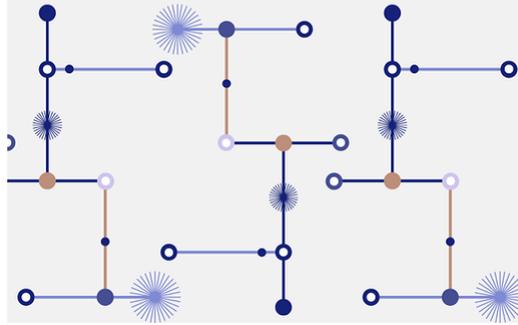
9/27: [Quickbooks Online: Measurable Improvements](#)

9/29: [Combating Common Time Wasters In Your Accounting Firm](#)

11/3-11/5: [AICPA's Women's Global Leadership Summit](#)

12/7-12/8: [Accounting & Finance Show USA 2021](#)

Grits challenge



True Grit

One of my favorite movies as a kid was "True Grit," and not just because it contained my favorite food in the title. John Wayne was my hero, but I also liked the courage and **grit** of the child who pressed him into service. If you haven't seen the movie, you can watch the 2010 remake on Amazon Prime. Jeff Bridges replaces John Wayne in this version. Let's see if refried *grit* is as good as the food version.



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