The CFO Project

You Don't Need More Clients. You Need A System.

A guide for accountants and bookkeepers who want to offer CFO advisory work to the small businesses they already serve.

Why a repeatable system, not more hours, is what makes advisory work.

START HERE

Before You *Start*

This guide is for the accountant, bookkeeper, or CPA who thinks there should be a better way to run a practice.

You're good at your work. You put in the hours. And still, earning more usually means working more.

There is another option: offering a CFO Advisory service. It lets you charge for the work itself, not the time it takes. This guide explains why that works and shows you the system we teach for it, called the One Clear Path.

> **A Quick Note:**
> We'll keep this plain. Guiding a small business is *more straightforward* than it sounds. By the end you should have a clear sense of whether it's something you want to do.

CHAPTER ONE

The Accountant's *Trap*

01

Here is the trap almost every accountant and bookkeeper is stuck in. To earn more, you have two options: take on more clients, or work more hours. Both cost you the one thing you can never get back, which is your time.

It gets harder every year. The routine work, like data entry, categorizing, cleaning up books, and filing, keeps getting faster and cheaper. Software and AI now do in seconds what used to take hours. That's good for your clients. It also means accuracy and speed no longer set a firm apart, because most firms have them.

This puts steady pressure on compliance work. Prices get squeezed, and clients shop around more than they used to.

> *If the only way to earn more is to work more, you've bought yourself a job, not built a business.*

The answer isn't to work harder. It's to change what you sell.

CHAPTER TWO

A Different Way to Get *Paid*

02

A CFO for a small business isn't the CFO of a Fortune 500 company. You don't need another degree, a fancy title, or a finance team. You're a trusted guide who helps an owner understand their numbers and know what to do about them.

Think about what a small business owner actually wants. Not a spreadsheet. Not a report they don't understand. They want a business that works, and "works" looks different for every owner. One wants to finally take a real vacation. Another wants to open a second location, or pay themselves what they're worth, or build something they can eventually sell. Your job as a guide is to figure out what success means to this owner, put a number on it, and help them get there, with cash flow as the engine that makes it possible.

There are more than 36 million small businesses in the United States, and about half will not reach their fifth birthday. Most of them fail for one reason: they run out of cash. That's exactly the problem you're equipped to help solve.

If Imposter Syndrome is Talking, *Read This:*

You already read financial statements. You already spot problems owners miss. The Advisory part isn't about knowing more accounting, but about sitting on the same side of the table as the owner and helping them make better decisions. *You can do this.*

CHAPTER THREE

Why Expertise Alone is *Not Enough*

03

Here is where most accountants get stuck when they try Advisory work on their own. They have the knowledge, but no system. So every client becomes a custom project. You reinvent the wheel each month, the work spills over, and before long each client feels like a second job. That's a fast road to burnout and thin profits.

AI has the same problem when it is used on its own. Point a tool at a real client with no system and no clear scope, and it gives back a general answer that could fit any business, which means it doesn't really fit that one.

> *The knowledge was never the hard part. A system is what lets you do the work the same way for every client.*

That is the idea behind the One Clear Path. It's a system, not a set of tips. You follow the same steps with any client, in any industry, which keeps your work consistent and the time it takes under control.

CHAPTER FOUR

A Look at the *One Clear Path* 04

Here is how the One Clear Path works. The whole logic fits on a page, and that's on purpose. A system you run with every client, in every industry, has to be simple enough to hold in your head.

It takes a business from Point A to Point B

Point A is an owner who is unsure about their numbers and reacting to whatever this month throws at them. Point B is an owner who understands their business, knows what to focus on, and knows what to do next. Your job is to walk them from A to B, one month at a time.

It focuses on what actually keeps a business alive

The One Clear Path zeroes in on one thing above all: **consistent, positive cash flow**. It's what keeps the doors open. Profit and revenue matter, but they're steps along the way. Cash flow is the destination. The system breaks cash flow down into a handful of specific things that drive it, so you can spot exactly what's working, what isn't, and what to tell the owner to do about it. Your advice is always grounded in the numbers.

It is built to fit in about two to four hours a month

Because it's a repeatable system, not a custom project, you can do useful work for a client in about two to four hours a month. Each client takes less of your time, so you can work with more owners without adding long days.

It runs on the same steps every month, and every year

Here is the actual rhythm, one that repeats every month and resets once a year. Once a year, you and the owner set targets. Not just a revenue goal, but targets for the handful of things that truly drive their cash flow. That is the plan for the year.

Then each month, before you meet, you do three things. You look at where the numbers actually landed. You project where they're headed if nothing changes.

CHAPTER FOUR

A Look at the *One Clear Path* 04

And you score each driver: on track, slipping, or off track. Now you can see at a glance where the business needs attention.

In the monthly meeting, you don't unload all of that on the owner. You bring the one or two things that matter most right now, and together you decide what they'll do about them before you meet again.

That is the whole loop. The same steps, every client, every month. The owner always knows where they stand and what to do next, and you never sit down to a blank page wondering what this month's meeting is about.

CHAPTER FIVE

What This Could Look Like *For You*

05

Try running the math on one client. About $2,000 a month for roughly four hours of work is around $500 an hour. For comparison, the average accountant's wage works out to about $39 an hour. Same knowledge, priced two entirely different ways.

~$500
per hour as a CFO Advisor $2,000 a month ÷ about 4 hours

~$39
the average accountant's hourly wage

Now stack a few. Five clients at those fees is $10,000 a month, and unlike project work, it doesn't reset. It shows up again next month, and the month after. That is the difference between rebuilding your income every year and building on top of it.

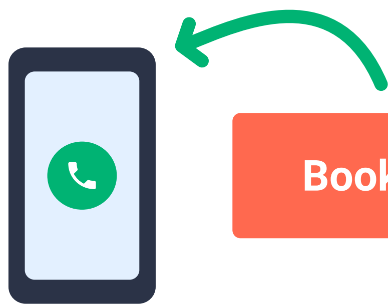
$10,000 per month
5 clients × $2,000, recurring every month

$2,000 is the average retainer charged by a The CFO Project CFO Advisor.

ESCAPE THE TRAP. BUILD THE PRACTICE YOU WANT.

Book a *Right-Fit Call*

Schedule a 30-minute call with one of our Enrollment Advisors. We'll show you exactly how we'll help you start a CFO Advisory business in our done-with-you program. You'll also learn how the program works, the investment options, and about our money-back guarantee.



Book a Right Fit Call

It is a fit if you are

- ✓ An accountant, bookkeeper, CPA, or tax pro ready to move beyond hourly work.
- ✓ Ready to guide clients, not just report to them.
- ✓ Willing to follow a proven system instead of winging it.

Probably not a fit if you are

- ✕ Looking for a get-rich-quick shortcut. This is real work, done smarter.
- ✕ Not willing to talk to business owners about their numbers.
- ✕ Set on doing it your own way instead of following a proven system.

Prefer your phone? Scan to book your right-fit call!

ABOUT US

About *The CFO Project*

The CFO Project helps accountants, bookkeepers, and other financial professionals add a CFO Advisory service to their practice, so they can earn more, build recurring revenue, and have a bigger impact on the businesses they serve.

We're a community of more than 500 members, built on one mission: to eradicate small business failure, one trained CFO at a time.

Dyanna Salcedo, CEO

Dyanna brings 20 years of leadership across Wall Street, consumer brands, and the U.S. Army, and ran her own CFO Advisory practice, so she knows the work our members do

Adam Lean, Co-founder

Adam is a former accountant who built a successful CFO Advisory firm, then set out to teach other financial professionals the same systems.

The CFO Project

Ready when you are

1 **Book a call** 30 minutes

2 **Get a plan** tailored to you

3 **Grow profit** month over month