

The Virtual CFO Playbook Course Modules

What you will learn to support your Virtual CFO service offering

Module
01

Intro to Profit-Focused Accounting

- What profit-focused accounting means
- Why profit-focused accounting is valuable for clients
- How to approach weekly and/or monthly client meetings

Module
02

Virtual CFO Service Offerings

- How to create service packages with core services
- How to plan and execute effective meetings with clients to deliver your services
- Tools to use when providing your services

Module
03

Cash Flow

- How to deliver cash flow meetings
- How to help business owners manage their cash flow
- How long-term cash planning can influence a client's business decisions

Module
04

Productions Metrics & Forecasting

- Forecasting value-add for you and your clients
- How to create a dynamic forecast
- Recommended forecasting tools

Module
05

Financial Statements & Metrics

- How to focus on consulting versus reporting
- Leveraging key financial statements and metrics
- Scheduling and frequency tactics for financial statements
- How to prepare for a financial statement meeting
- Determining the cadence of a financial statement meeting

Module
06

Month-End Closing

- The “garbage in, garbage out” goal
- Why you need a documented process
- Who takes charge of the month-end close
- What statements and metrics to focus on
- When to begin the month-end close process
- Where to organize your data and procedures

Module
07

Pipeline & Biz Dev Meeting

- Why you should review a client’s pipeline with them
- Pipeline and business development (biz dev) meeting cadence
- How to structure a pipeline meeting

Module
08

Bill What You’re Worth

- Five ways to bill your clients
- The six-step sales and conversion process
- Recommended tech tools for sales, pricing, and billing

Module
09

Marketing Your VCFO Firm

- The importance of finding your niche
- How to define your niche
- Why you need to search for clients outside your local market
- Four important marketing areas
- How to get started when it comes to marketing

Module
10

Onboarding New Clients

- Why you should create an onboarding process for new clients
- How to allocate onboarding roles
- How to plan and execute a successful client kickoff meeting
- How to establish and manage expectations both internally and externally

Module
11

People

- Why you should have a formal hiring process
- Strategies for hiring top performers
- Best practices for the interview process
- How to successfully onboard new employees
- Effective employee retention strategies

Module
12

Core Values

- The importance of core values for a firm offering Virtual CFO services
- Choosing the right core values
- How to embody core values in a virtual working environment

Module
13

Processes

- Why your Virtual CFO firm needs standardized processes
- When to start creating processes
- Our 80/20 rule for processes
- Tools for process documentation and delivery
- Tips for developing client-focused processes

Module
14

Working Remotely

- The three pillars of effective distributed teams
- Human resources policy concerns and considerations
- Establishing a meeting structure and cadence
- The value of in-person retreats
- Cloud-based tools for remote communication and security

Module
15

Getting Things Done

- Why the GTD method matters for CPAs
- An Introduction to the GTD flowchart
- Making lists in the GTD framework
- Useful tools for applying the GTD method