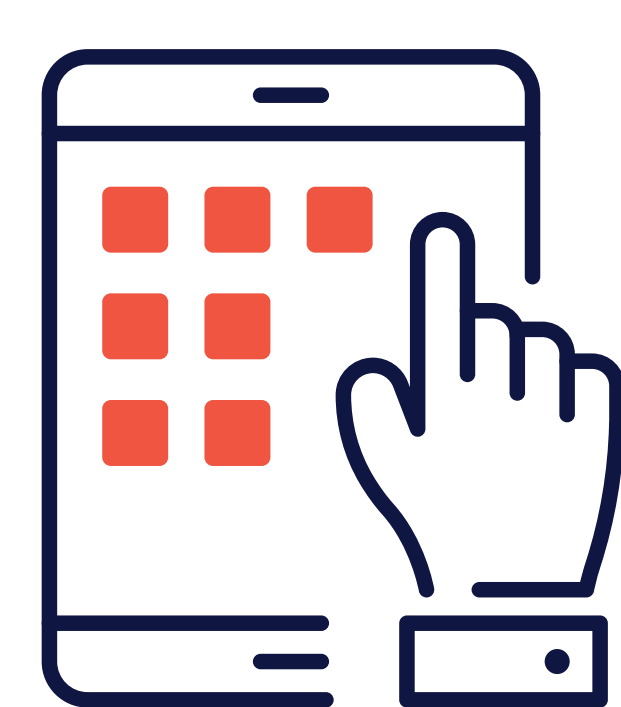


Master The Modern Firm® Playbook: Your checklist for success

Building a modern firm isn't always easy—and it won't happen overnight. That's why every accounting firm needs a playbook to make it happen. Think of this playbook as your toolbox, filled with the resources you need to...

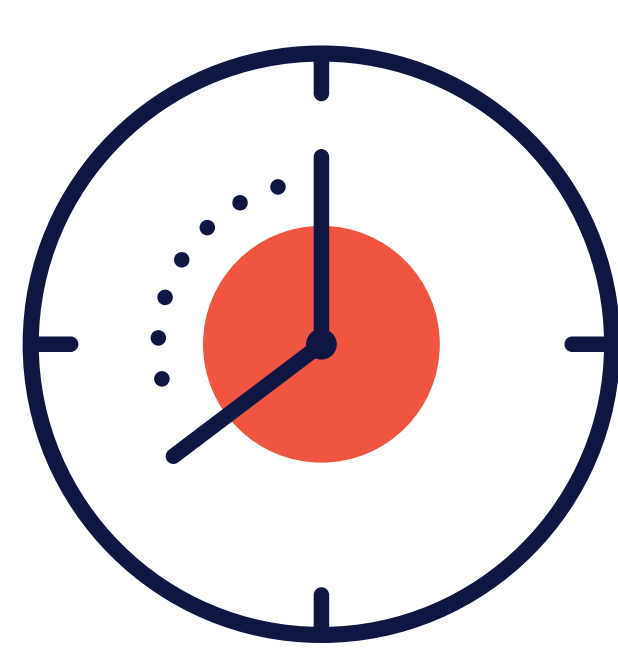
- Streamline processes
- Boost efficiency
- Create a thriving culture

Taking action is the key to success, so pick up the tools, proactively use them and push through any challenges. You can get started using The Modern Firm Playbook with our easy checklist.



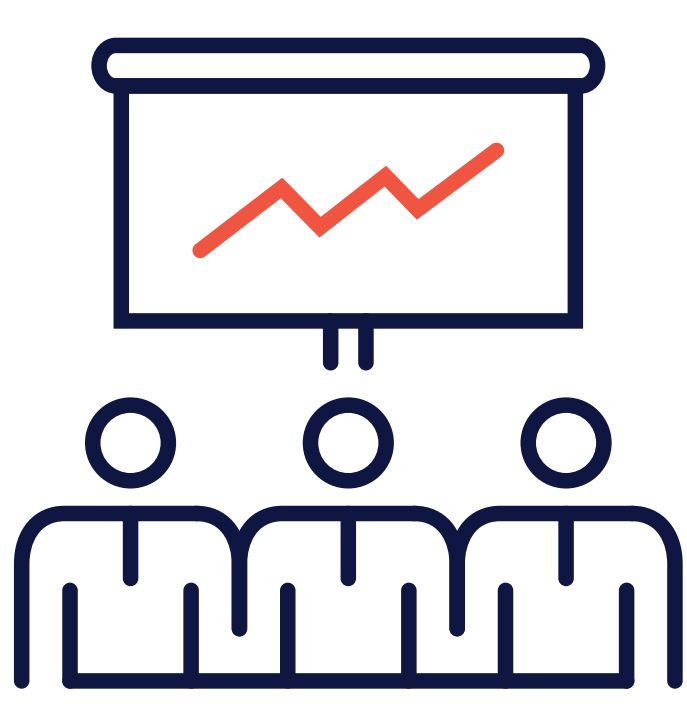
Before you start

- ☒ **Check your mindset**
Be open to change and solutions, and get staff buy-in.
- ☒ **Embrace uniqueness**
Recognize and value what makes your firm unique.
- ☒ **Complete the GPA**
Identify and prioritize areas to address.



Allocate time effectively

- ☒ **Adopt an investment mindset**
View time spent on improvement as a long-term investment.
- ☒ **Block your calendar**
Schedule and commit dedicated time for firm improvement to avoid disruptions.
- ☒ **Set attainable targets**
Use time estimates to set completion dates.



Who to include

- ☒ **Consider the impact**
Identify who will be affected by changes.
- ☒ **Incorporate diverse perspectives**
Include multiple viewpoints.
- ☒ **Get aligned**
Consider short- and long-term goals for strategy and succession.



While in a module

- ☒ **Keep an open mind**
Embrace change and step out of your comfort zone.
- ☒ **Illustrate positive impact**
Reiterate the benefits of change.
- ☒ **Take notes**
Document key points throughout the modules.



What's next

- ☒ **Act quickly**
Start implementing changes immediately after finishing a module.
- ☒ **Create an action plan**
Craft an actionable plan that aligns with the module content and your firm's goals.
- ☒ **Lead by example**
Show staff you're on board and share the positive impacts of changes.

Spend more time *on* the business and less time *in* the business

To maintain momentum and foster ongoing improvement, engage your team in the process so that everyone feels included, appreciated and aligned. Also, frequently check in with your team to pinpoint areas that may need improvement and address challenges that come your way.

Building a modern firm will ultimately help your business thrive.
Use The Modern Firm Playbook to get there.

Get started now
academy.rightworks.com

