

THE RENEW OPERATING MODEL

24-Month Transformation Program

A structured, step-by-step system to
build a more valuable accounting firm.

Renew Group has helped us reduce work hours, focus on the right clients, obtain better leverage and focus our firm.

Blake Meester,
Meester & Company, California



WHY THE RENEW OPERATING MODEL

A better model. Better outcomes.

The firms that lead their markets have one thing in common: they made a deliberate decision to run a different model. They serve fewer, better clients. They charge prices that reflect the value they deliver.

They work structured hours year-round — not just surviving tax season. Most firms are built around tax season, not around clients. The Deadline-Driven Firm is an operating model problem — not a scheduling one.

Revenue grows as do costs. Profit doesn't. Hours stay high. The same problems repeat every tax season.

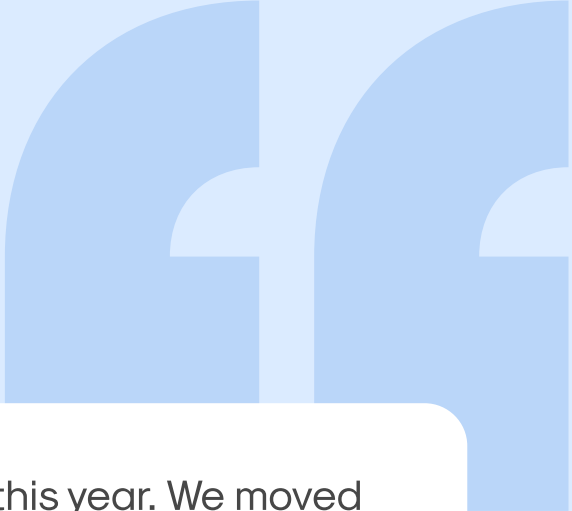
The Renew Operating Model is built on more than 25 years of working with accounting firms across North America. It gives you the system, the structure, and the peer accountability to make that same transition — in 24 months.

THE OLD MODEL

- ✗ An all things to all people business model (revenue focused)
- ✗ Pricing in arrears
- ✗ Transactional model with 60+ hour tax seasons as the default
- ✗ Living in the gap of what needs to be done
- ✗ Trading dollars with the wrong clients and not serving your A clients at the standard you want

THE RENEW OPERATING MODEL

- ✓ Ideal Client Profile (ICP)-only client base
- ✓ Upfront Prices that reflect value delivered
- ✓ <40 hours year-round
- ✓ Recurring revenue that compounds
- ✓ Profit per owner before comp of \$500K+



"Tax season has been great this year. We moved on from 400–500 clients that we didn't want and have picked up a couple hundred new higher-paying clients. Not working nights this year. Best tax season in years.

Last year on March 31st we had \$300k in the bank and owed \$250k on our credit line. This year we had \$650k in the bank and owed nothing on our credit line. Joining Renew was the best decision we ever made."

Renew Member
after their FIRST tax season in the program

QUALIFICATION

Who this is (and isn't) for

THIS PROGRAM IS FOR

Serious Firm Owners

You're ready to stop repeating the same tax season. The motivation to build a different kind of firm is strong enough to act on.

Accountants ready to transform

You know a better model exists. You want a structured, proven path to get there – not another book or webinar.

People who are coachable and accountable

You're prepared to listen, learn, and execute on strategies that will initially feel uncomfortable – and take managed risks. You show up and do the work.

THIS PROGRAM IS NOT FOR

Firms happy in their comfort zone

If satisfaction with the status quo outweighs the desire to change, this isn't for you. The program is not for tinkerers.

Firms happy in their comfort zone

The Renew Operating Model requires genuine commitment – in time, focus, and financial investment.

Short-term thinkers

If you're looking for a quick fix rather than a permanent model change that increases profitability and the long-term value of your firm, this isn't it.

THEJOURNEY

Your 24-Month Journey

The Renew Operating Model takes you through four structured phases. Each builds on the last. Every phase has clear targets, peer accountability, and direct coaching to keep you executing.

Phase 01

Foundation

Months 1–6

- Pareto for Profit™ analysis
- Current state assessment
- Pricing floor established
- Insanity Zone clients identified
- Target client defined

Phase 02

Building

Months 6–12

- Client rationalization underway
- Price increases implemented
- Service model refined
- Scope creep eliminated
- First measurable results

Phase 03

Established

Months 12–18

- Right clients, right prices
- AHCR moving toward target
- Tax season measurably better
- Team capacity improving
- Model working consistently

Phase 04

Ready

Months 18–24

- Transformation fundamentals solid
- Strategic Growth assessment
- Marketing system groundwork
- Annual Pareto review
- Path forward confirmed

"We were a practice, not a business. Renew brought focus to us, we set targets, and we began hitting them. When you start to get that momentum, it changes the way that you think."

Renew Member, California

"I'm going home every night about 5:30 or 6:00. Then looking forward to coming in the next day. Such a tremendous change from yesteryear when it was 1:00 am!"

**Renew Member,
Missouri**

"Within 3 months we completely remodeled our pricing approach. We eliminated scope creep AND increased prices by at least 30%."

Renew Member, California

"We never agree to reduce the quoted price. Anyone who negotiates should not be a client of the firm. We price to win — not to win the work."

**Renew Member,
Texas**

Subscription Revenue Before: \$0 | After: \$1.73M

Renew Member, Arizona

Members who complete Transformation are invited into Strategic Growth — where the focus shifts from model-fixing to intentional, profitable expansion.

PROGRAM COMPONENTS

What's Included

Six components. One operating model. Everything you need to execute the transformation — nothing you don't.

Pareto for Profit™

Annual client profitability analysis. Identifies your Insanity Zone, maps your highest-value relationships, and drives every pricing and client decision you make in the program. Your Pareto data feeds directly into the Renew Benchmark — so you see exactly where you stand against high — performing member firms.

Peer Execution Groups

Frequent small-group sessions with non-competing firms at a similar stage. Real numbers on the table. You can't hide.

Direct Coaching

Structured coaching from Shannon and Colin — not a junior coach, not passive content. Sequenced around four foundational sessions in your first phase:

- Make Your Firm Your #1 Client
- Pareto for Profit™ — Quick Wins
- Pricing Mastery — Minimum & Target Prices
- Defining Your Model Firm — Goals & Metrics

Live Calls

Two formats, every month. All Firms Calls brings every member together — Shannon and Colin facilitate, with a topic of the day, case studies, and live Q&A. Connect Live Calls are open group coaching — bring your current issues, and we'll work through them together.



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Connect Forum

Ongoing member community for real-time answers, peer advice, and ready-to-use resources — so you never have to reinvent the wheel.

Regroup

Our in-person event. Hard-hitting peer accountability, Model Firm workshops, and the relationships that drive long-term results.

"I think you can't join fast enough because you need to start transforming your life and your firm now. It's been awesome for me, my staff, and my family."

Matt DePretis, CPA, California

Five stages. One operating model

The only accounting firm program built on a proprietary operating model. Every stage has a clear objective, structured training modules, and the tools to execute — not just understand.

STAGE 01

Position

Set the mindset and market position that every other stage depends on. Make the Firm the #1 Client. Nothing else works until this is done.

3 modules

STAGE 02

Diagnose

Run your Pareto for Profit™. See exactly where your revenue comes from — and where you're losing time and profit to the wrong clients.

1 module

STAGE 03

Price

Rebuild your pricing model from the ground up. Set minimum and target prices, eliminate scope creep, and stop working for free. The deepest stage in the program.

6 module

STAGE 04

Select

Define your Ideal Client Profile and reshape your entire client base around it. No marketing without a defined ICP. No growth without the right clients.

2 modules

STAGE 05

Deliver

Build the ICP recurring model and the firm operations to sustain it — fewer hours, more predictable profit, a team that works.

1 module

STAGE 06 (Comes next)

Grow

Niche development, marketing for target clients, and intentional profitable growth.

Strategic Growth Program

THE PROVEN BLUEPRINT — WHAT COMES WITH EVERY STAGE

Pricing calculators

Scope agreements

Subscription model templates

Pareto analysis tools

Client pricing letters

ICP templates

Pricing scripts & frameworks

350+ resources in the vault

You cannot correctly price the wrong client.

Renew Maxim

"Pareto for Profit™ was a game changer. We had a hunch where the time was going — but the Pareto was the shot in the arm we needed to rip the band-aid off and change our model. My only regret is I wish we'd done it sooner."

Perry Ghilarducci, BPM Sacramento

MODEL FIRM METRICS

Every goal has a number

These are not instructions — they're outcomes. They describe what member firms look like when Transformation is complete. Working through the Renew Operating Model is what gets you here.

METRICS

MODEL FIRM TARGET

Average Hourly Charge Rate

\$250+

Average Revenue per Client

\$12K – \$25K

Owner hours per week

<40 year - round

ICP / recurring revenue

100%

Profit per owner before comp

\$500K+

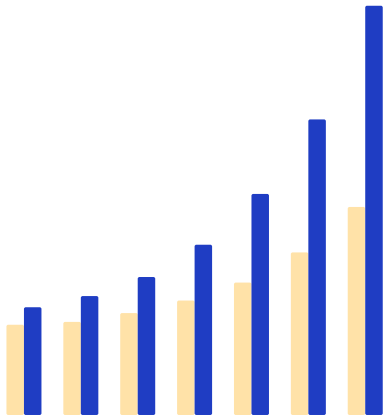
Source: 2025 Renew Bite-Size Benchmark Assessment —
built from actual Pareto data submitted by member firms

Pareto for Profit™

What most firms find when they run their first Pareto — and what the Model Firm looks like.

Leverage Zone	20% clients	~80% rev
Danger Zone	45% clients	~16% rev
Insanity Zone	35% clients	~4% rev

In the Model Firm, the Insanity Zone is zero. Every client on your books should either be ICP-compliant or on a structured path out.



WHAT 3+ YEARS IN THE PROGRAM LOOKS LIKE

+19%

Revenue per owner

+55%

Higher minimum prices

-14%

Fewer hours worked

The people behind Renew

Renew was founded by two accountants who have spent their careers working inside the profession — not advising it from the outside. Shannon and Colin bring more than 50 combined years of coaching accounting firms across the US and beyond.



CO-FOUNDER, RENEW GROUP

Shannon Vincent, CPA (Inactive)

Shannon has dedicated his entire career to working with accountants. His career began at KPMG in San Francisco, followed by specialization in high-net-worth individuals and emerging growth businesses at two well-known San Francisco regional firms.

Shannon then spent six years at RANONE — an international consulting firm — including two years as Chief Operating Officer of a \$10M business unit.

Since 2001, he has consulted with firms ranging from Top 100 to sole practitioners, helping them create sustainable, profitable businesses. Shannon is an avid speaker and is relentless in his pursuit of helping accounting firms build a better operating model and a better life.

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CO-FOUNDER, RENEW GROUP

Colin Dunn, FCA

Colin is a Chartered Accountant with extensive experience working with accounting firms to develop and implement strategies for building better businesses.

Having spent nearly 10 years in a business advisory capacity at a fast-growing UK firm, Colin has spent more than 30 years coaching accountants, creating content, and building communities that help firms collaborate and learn.

Colin co-founded Renew Group with a simple belief: that accounting firm owners can transform their firms and their lives by serving the right clients, charging the right prices, and building a model that works for them — not the other way around.

The program is by application only

We've worked with accounting and CPA firms from \$500K to \$5M in revenue across North America for more than 25 years.

The assessment takes 10 minutes — and we'll tell you honestly whether Transformation is the right fit for your firm right now. Schedule a call — find out if we're a fit.

