



# Elevate Your Firm from Bookkeeping to Business Advisory with Liscio

The Totally Booked Four-Step Action Plan to  
Take Your Practice to Peak Performance

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**Kelly Gonsalves**



## Section 1

# Welcome To The New Era Of Business Management For Bookkeepers

Are you ready to take your bookkeeping firm to the next level and transition from transactional to advisory services? Be available to your clients while setting clear boundaries to protect your personal time.

This is what I have done over the past few years and the payoff for elevating my services from a monetary and client experience perspective has been significant. It's also helped me serve my small business clients better.

As we all know, serving your clients is just the beginning, we also have to make sure our data and systems are secure and in compliance, this is the cornerstone of a top-level firm. How do I manage this for my firm? The solution is simple: Liscio.

Liscio provides a safe and secure environment that is easy to use for me, my staff, and my clients. It has helped me optimize my data security and take care of compliance requirements to free me from administrative burdens.

**Additionally, it helps me create a more professional client experience to differentiate my firm with streamlined and perfect communication inside and outside of it. Plus, bringing my entire firm operations together with Liscio elevates my business beyond bookkeeping so I can focus on being a true business advisor.**

**This has been transformative for me both personally and professionally.**

**I couldn't have taken my firm to the level it is operating at now without Liscio.**

*Kelly Gonsalves*





## Section 2

# Take Action Now! Elevate Your Firm with a Solid, Scalable Plan

ABeing able to take your firm to the next level requires clear intention and attention to detail. I am sharing the exact five-step plan I used to exponentially grow my firm so you can elevate your services client service more easily, too.

The beauty of leveraging Liscio is that it enables me to scale and deliver high-level services efficiently while building my business with technology. This plan has enabled me to provide all of the services and systems of a larger firm and keep my client communication all in one place.





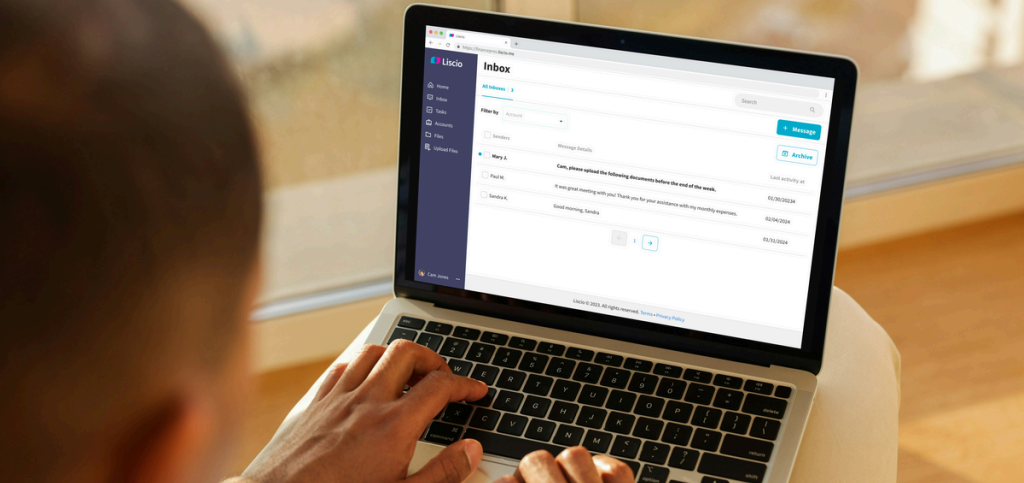
## Step 1

### **Redefine your firm to go from surviving to thriving!**

For accounting firms with traditional back-office systems and processes the technology disruption of this era will be epic. I recommend getting ahead of the curve by implementing the right tech infrastructure now.

The truth is, clients don't care about how the work is done -- they care about the quality of the service they receive, so leverage the maximum amount of tech to yield exponential productivity gains then take that extra time to become more of an advisor to your clients.





## Step 2

### Leverage Liscio to create a new level of profitability and client management.

It's not about the tech but it is about the experience that the tech can provide for you and your clients. Our profession is evolving and so are our clients. Business owners are rapidly shifting from being uncomfortable with technology to being digital natives.

To scale your business you need to have the right tech because the labor pool is just not there. With fewer people joining the accounting ranks technology lets us get more done with smaller teams.

One of the best payoffs with Liscio is that I stopped chasing clients for information! By putting the tools my clients need to work with me in their hands, I was able to take back my time and you can do the same!





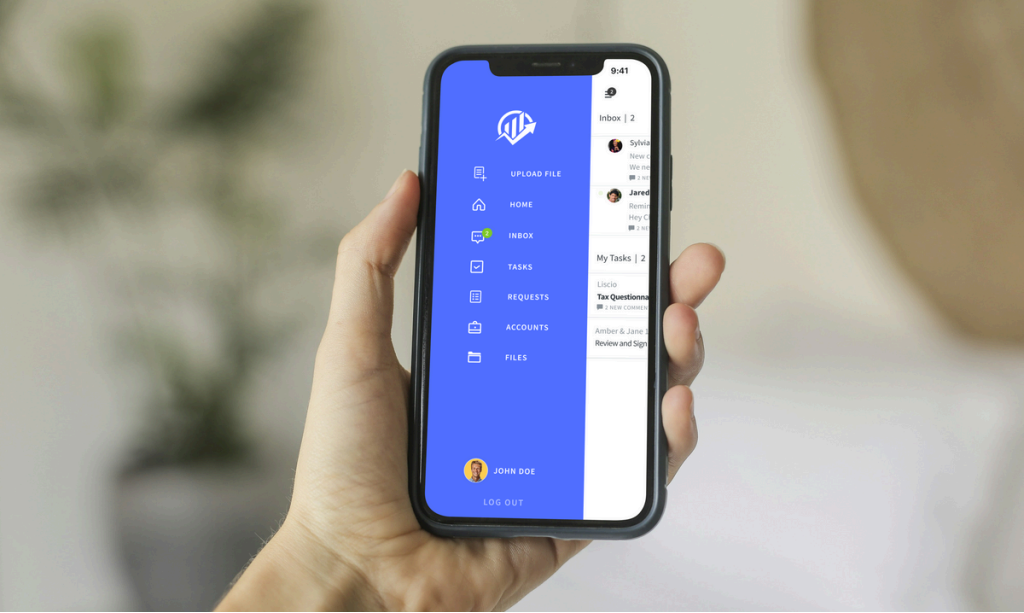


## Step 3

**Upleveling your firm is not just about service, it's also about security and compliance.**

Security of client data is no longer nice to have, you need to comply with all safeguards. Streamline client data collection in a secure fashion. Clients are as concerned about their data security as you are.





## Step 4

### Professional presence, build your brand as a business asset.

With all of the competition in the market, you need to build your brand to differentiate your firm and instill confidence.

Client experience is the top brand asset. Most firms get most of their growth through referrals. Offering the experience clients want (easy, all-in-one, branded, etc) is a sales and marketing hack that lets you grow the business the right way (more leads, more good clients, no need to take the clients you don't work well with).

Liscio has custom branding options that elevate my business. [Book a demo](#) so you can check them out, too!





# SEIZE THE FREEDOM CREATE THE FIRM YOU WANT!

Trust and reliability are essential components of building a scalable strategy for elevating your firm. From ensuring you can deliver services efficiently to freeing you from administrative, compliance, and security burdens, Liscio makes it easier to become your clients' trusted advisor.

**LEARN MORE [HERE](#)**

