

Rob Walsh

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Specialist Business Consultant and Mentor

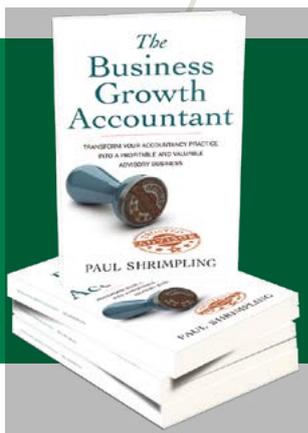


Founded in 2004, Clear Vision Accountancy exists to make a difference to the lives of UK business owners.

I am an accountant, business adviser, mentor and author, passionate about helping business owners run firms which serve their customers, their teams and most importantly, themselves and their families.

My work and the results I provide challenge the traditional accountant bean-counter stereotype. I believe accountants can and should change their customers' lives.

In this interview Rob shares the tailor made processes and tools they have developed to identify and then support the goals of their mainly dentistry and veterinary business owner clients.



Rob Walsh

Paul Rob, the starting point is just a quick overview on the business advisory work that you do, the number of clients, type of work, what form does it take, so it is giving me – the interviewer – and the readers a perspective on what you do, with how many people and how it works.

Rob Is this just mine or the consultancy in general?

Paul You, it is what you do, this is all about Rob Walsh and his approach to business advisory work with clients.

Rob I work with 25 clients across the country and I start off with a vision day because we are Clear Vision Accountancy Group and our mission is, because we care to make a bloody difference, so therefore, what we start off with is a vision day. The vision day is absolutely focused on the personal goals for at least half the day. What barriers they are facing personally, where their mind is at and what goals they want to achieve, then you are on to the business goals and then we can eventually get to the vision they want to create for their business, which then can help them achieve their personal goals and their business goals.

We analyse the business in the afternoon and come up with some key areas which need focus on and that turns into project plan and the project plan is then created with timelines and with responsibilities and

accountabilities, to make sure we work to a good time claim to achieve the goals in a specific manner.

Paul What do you mean by 'specific manner'?

Rob So, one of our clients, we had a vision day with and he wanted to achieve ten personal goals by the end of 2010 and we did this in 2005. Because we made them specific to him and he wanted to go for it, he had achieved his goals by 2008, two years earlier than his target date. The only one he didn't do was get married again, he is still unmarried, I think he is happy about that at the present time. We make the goals very specific.

And then recently in August we did a vision day and it was absolutely apparent during the day, that the person really, really enjoyed kite surfing but his mind was work, work, work, work, work and it became apparent that in kite surfing, he actually allows his mind to be freed up so he can concentrate on building the business. So guess what we did? We forced him to go kite surfing and then we forced him to do kite surfing every fortnight, for weeks after that.

At Clear Vision we work with the individual to make sure that their mind is in a good place as well before they undertake the goals that need doing for the business. Once we go through this process and really look at themselves and their profile and its weakness, we are having a bond with them which gets very deep, very early in one day. Then the trust comes very quickly after that because we start implementing what we say we are going to do.

Paul Let's just unpick the Vision day process. Before we go there, in 2016, how many consulting clients?

Rob For myself 25, for the firm 35.

Paul Right, okay and the value of the fees for consulting only, not accountancy, would be what, across those 35?

Rob £200k.

Paul £200k across the 35.

Rob Yes.

Paul Right, okay, great, all right, and every one of them has a vision day, is that right?

Rob Every one of them has had a vision day in some way or form, yes at some point.

Paul Right, okay, so run us through this structure of your vision day, if you would?

Rob Okay, 8.55am take the piss.

Paul That is understandable [laughs].

Rob We basically, where there is two people in the room, we ask them what their personal goals are and we have got set questions that I relate to but, it is normally work life balance, we use a wheel whereby the wheel is where they are regarding time spent with family, are they happy with their health, how happy they are with their business, how happy are they with their wealth, how much fun they are having, how much they want to do, so it is the wheel of life.

We get the wheel of life sorted for, bearing in mind this is a one by one process, so they do it all first. We do husbands and wives, so they share all their personal goals and the wife or the husband is not allowed to talk until the person doing it lists all their personal goals. We ask about their obituary, what is going to be said on their gravestone, what their purpose is and what they want to do and all of their goals, whether it is assets, whether it is speaking goals, whether it is making a difference, whatever it was, those are the goals.

Then, we do the same process with the partner in the business and then we ask them to comment on each other's goals and see what comes up then. We then put a time frame to the agreed goals and put some money, financials, behind those goals to see what needs to be achieved by when. For example, we want to put our children through school fees, which is

going to cost £20,000 a year, how can we do it? So that is one of the goals, that is then specific.

So, that is the personal goals done, and then we look at the business goals to actually see what they want to achieve from a business point of view: size, location, team, type of client, type of service, type of product etc., etc. Then we ask them to write down in one sentence why they are in business and also what vision they want to create for their business. This is using the words that they have been mentioning beforehand talking about their business and so there is a sentence on both of those mission visions that comes together, normally by about one o'clock approximately, and we ask them to go away and think about that mission vision within two weeks and come back with the correct terminology. We then ask them to...

Paul So you are hinting there that the words are really important.

Rob The words are absolutely crucial.

Paul Why is that?

Rob Because unless they can measure their vision, then how do you know, if you are achieving it or not?

Paul Well measuring is about numbers as opposed to words...

Rob

Okay, so, example. If somebody has used the words, exceptional service, I will ask them what exceptional service looks like. I will ask them, how are you going to measure it? If they used the words, ideal client, I will ask them how we are going to measure that, if they use the word, systems, how many systems are in place, how many systems are going to be put in place, if they used the word, fun, how are you going to measure fun?

So, I will not let them go through, I will not let them pass the vision statement until they have got it absolutely clear in their mind, what they want to achieve, why they are doing it and measurable. Sometimes I have held a vision day and I get to five o'clock and we have just done personal goals in the vision day. It doesn't matter, it doesn't matter at all, those are three key things and core values of the business.

So, it is imperative that we pin them down on what their mission and vision is and how they are going to measure it and what their goals are so, we at Clear Vision can help them achieve those goals. That is part of our DNA, part of our purpose; that is why we are in business, simple as that.

Part of the conversation around vision missions, around core values, what values do they uphold with themselves and with their team and therefore, I am not saying the core values are measurable but they are again, the DNA of your business and can be measured if you so wish or they are used as the bible of the business and therefore can be looked at, adhered to, used in whatever team language you want to use.

At that point, we talk about whether they are in the right frame of mind to actually put the vision and mission in place to achieve their personal business goals. I run a session looking at whereby, are they working in fear, are they working in confidence, lack of confidence, are they working in

pride. So there is a conversation around that as well, which is normally very enlightening.

Paul So that is the emotions, the way they are feeling about...

Rob Yes, it is the emotions about the way they are feeling about their business and what barriers they are putting in place in their own mind, so they cannot achieve their vision mission and goals.

Paul So you are looking for the things that they are, if we are being gentle, we would call them handbrakes, the things that are preventing them to accelerate towards their goals...

Rob Correct.

Paul If we were being harsh, we would go, the stuff that they are using to defeat themselves.

Rob Correct, so healthy body, healthy mind, healthy spirit basically, and it is those, in your language, handbrakes that are full on which is stopping them to go for it. Are they feeling guilty about something, are they not dealing with the white elephant in the room, what is the big issue that they are not dealing with and is it an issue. If you look at fear, people say they

are fearful of doing this, fearful of doing that, what does fear stand for, fear stands for false, expectation appearing real.

Paul False evidence appearing real.

Rob False expectation appearing real.

Paul False expectations. My reference to that is false evidence appearing real but there you go.

Rob So therefore, it is really important to us to understand where they are at because we cannot work with them unless they are in the right frame of mind and exactly that to help them to push forward on this change process, to achieve their vision mission and goals. So that is a very personal process, personal goals, business goals, vision mission, core values and then find where these hand brakes are within themselves.

Then we do a flip, we go into the business mode and say right, can you analyse your business using these two questionnaires and we get them to score out of ten on one of them and out of a hundred on another one of them. We then...

Paul Hang on a second, you have two questionnaires.

Rob Yes.

Paul Are we still on the vision day here?

Rob Yes.

Paul So there are two questionnaires, the score out of ten, what is that one about?

Rob So basically, there are ten questionnaires, from Michael Gerber, it is the small business questionnaire, asking them to score themselves out of ten where they are, regarding their vision, regarding written goals, regarding, are they ideal clients, regarding cash in their business, regarding systems in the business, regarding quality in the business etc., etc.

Paul Okay.

Rob So there are ten questions, they score themselves out of ten on that one questionnaire, I then ask the other partner to do it, at the same time and then I transfer the papers, the questionnaires to each other and let them see each other's results. Then I just do, on the flip chart, comparing results, where there is a difference of more than two, I want them to explain why they've scored a difference of more than two. Anything below a combination of 12, that is an action point to be dealt with.

Paul Anything below a...?

Rob Twelve. Two times six, is twelve out of twenty.

Paul Okay, cool.

Rob So if you get a twelve out of twenty, that is an action point.

Paul Okay.

Rob Normally in a small business, the common themes are: too reliant upon themselves, lack of vision, no written goal to achieve a plan, so those are the common themes that we work on, which vision we have already dealt with. We then transfer those points less than 12 out of 20 to an action plan, a project plan.

We then use another questionnaire, which is asking them to score how good is your sales process, how good are you at converting the leads, how good are you at your training on HR, how good are you at measuring things at all times, how good are you at measuring your team feedback scores, how good are you on your marketing?

So there are 15 questions where you score from 0, which is bad to 100 which is good. Anything below 60 is an action point to discuss, on one person. Anything below 20 is an action point.

We then prioritise the scores that are lowest, for example, if somebody had put 30 and the other person had put 40, and that is 70 out of 200, and that was the lowest score, then that is exactly what we discuss in the next stage of the process. So, why have you scored measuring success at all times at a low 70. So we discuss it, discuss it, have an action plan, have a consultation first, an action plan and put it to the project plan.

So those are the two questionnaires. Then we do strengths and weakness, so we ask one person to write the strengths down on the other person, then the weaknesses on the other person and we have a baseball bat in the room just in case the other one interrupts [laughter]. And then we allow the other person to agree to strengths or agree to weakness and move from there. And for the other person as well.

Then we have strengths and weaknesses. Then I ask them to... I challenge them on who is in charge of what, using their skill sets. So, from a strength point of view, right...

Paul So have you reached agreement, if they have got two business [inaudible 00:15:13] as you suggest, have we now reached agreement that they agree on each other's strengths and weaknesses?

Rob Yes.

Paul So we have talked that through, so that could be over in minutes or it could be over in two days or two years?

Rob I have not had anybody yet walk out of the room, which is good, but there has been a few baseball batterings.

Paul So we have reached agreement on the strengths and weaknesses, we have reached agreement on the goals, the vision, the mission?

Rob Yes.

Paul We have unpicked and identified a number of areas where there is room for action.

Rob Correct.

Paul So we have got those issues and now we are looking at strengths and weaknesses.

Rob We are now looking at who is in charge of what.

Paul Okay.

Rob So, who is the best person to be in charge of marketing? We have seven areas of the business, I have got sales, I have got marketing, I have got financial, I have got operations, I have got IT, I have got HR and I have got

admin. So, there are seven areas. So, who is the best person to be in charge of those seven areas?

And looking at the skills and weaknesses, we then decide who is in charge of what. That is a really important session because this is where accountability starts kicking in. Whatever project plan (action points we have created under marketing) then if partner number one has agreed to it and they have agreed to it, so that person owns the actions on that marketing.

We go through the seven areas until we have got... and sometimes financial could be a weakness so therefore we step in, we say Clear Vision can help, we can be your outsourced financial director controller or whatever. That is an opportunity for us to cross-sell.

Then we have a conversation... so we have got the goal sorted, the vision sorted, where they are at in the business, analyse the business, strengths and weaknesses, we have got the organisational structure going forward, and then finally we talk about systems, what systems have we got in the business and how we are going to implement systems in the business to actually make sure that we can work this through.

We then talk about the action points and then we talk about the next stage going forward and when they want the next meeting and when we suggest the next meeting is going to be held. Normally it is a team meeting.

Paul

This is a full on day, isn't it?

Rob It is very, very challenging running the day, it is using, it is listening, listening, listening, coming up with good questions and we have had people in tears, most people go in tears around some part of the day and the only people... Over the past 12 years, I have probably held in excess of 100 vision days and only 4 people haven't gone ahead with further work because they have either sold their business or they didn't want to take it any further.

[Interruption]

Paul You were saying, you have done about 100 vision days, 4 of them haven't continued because...

Rob They basically... End of, they want to sell their business and retire.

Paul Right, almost there and then...

Rob Yes.

Paul Or within a small time frame, so they don't want to change the business, just flog it?

Rob Correct.

Paul And that is a positive outcome as far as the vision day is concerned?

Rob Correct. So the vision day is really important to us and for all new clients we will be running a vision day or part vision day to get them on board, to ensure they are ideal for us. It is challenging, it gives us further work and that then helps us sell more consultancy for later on in the year.

Paul Right, we'll cover that in a minute. Great.

Rob Walsh Interview No.2

Paul So, we ran through vision day.

Rob Yes.

Paul Which is essentially, you listening after you have asked great questions around vision, mission, values, personal goals, resolving strengths and weaknesses and agreeing who is responsible for what, so you have got accountability processes built in for future meetings, future interaction.

Rob Correct, and a project plan that people adhere to.

Paul And the project plan is over what, for the next 12 months?

Rob Yes.

Paul Yes, typically?

Rob Yes.

Paul Right, okay.

Rob The next stage is a team day. We like to do a team day within four weeks of the vision day. The reason why is that it is good to get the team on board as soon as possible and how we frame that up, it is very important that the owner of the business stands up in front of the team and delivers his or her mission and vision and they have the chance to challenge him or her on that mission or vision, which is the first thing that we do.

We then break down the teams into groups of twos or threes and they then work in their groups to see if they agree with the vision and mission and if they do, how they would measure certain parts of it, so they are involved in the measuring process.

After we have done the measurements, we get them the key questionnaires, do you all agree with the vision and mission of the business and it is yes. Then we get them to sign off every person in the vision and mission, which goes into the business in a certain part, certain

area of the business, so that everybody can see it. So, that is them adhering and agreeing to it.

Paul So, we have got a printed out statement which is the vision statement?

Rob Yes.

Paul And everyone in the business signs it.

Rob And dates it.

Paul And dates it.

Rob Yes.

Paul And every client, business advisory client, you work with, you have had them do that?

Rob Yes.

Paul And how do the team respond to that?

Rob Well it is their chance to basically challenge the owner of the business as to whether it is a load of rubbish or whether it is feasible and it is their chance to be part of it.

Paul But the reality is, team members are not going to challenge the business owner on what the business owner says in the vision, are they?

Rob I facilitate it.

Paul So, you encourage and engage with the team so that you force them almost to challenge it...

Rob I go round one group by one group saying, okay what do you think about this, what do you think about this, what do you think about this? And if they are happy with it and they don't have issues, I engage with the groups to make sure that they are... I am challenging them, so therefore they can say what they feel in front of it, because this is their one chance to challenge it.

Paul And you would tee that up with the business owners in advance so that they know it is going to be potentially uncomfortable. And you are actually hunting for that discomfort?

Rob Yes, get it all out in the open.

Paul And how good are you at getting it all out in the open?

Rob I would say that from the feedback from the team and the teams days, they really do enjoy the vision part of the day because it enables them to see the direction that the owner wants to take it and they can challenge that person on where it is going and see whether they believe it is a good idea or a load of rubbish.

You can see by the body language in the day people who are engaged and people who are not engaged, so I tend to focus on the people who are not engaged and see why they are not engaged and get them to challenge it even more. You can see by lights coming on that people do get it and some people don't get it, which is fine. Whether they stay in the business or not, then that is up to them.

Paul Well, up to the employees and/or up to the business owners.

Rob Correct.

Paul Yes.

Rob Both parties, yes.

Paul So, you are generating conflict really?

Rob In a nice way.

Paul Constructive conflicts let's say, debate if you want to soften it. You facilitate and do the business owners engage in the debate or are they there to listen?

Rob It's a mass debate.

[Laughter]

Paul Forgive that comment by Rob Walsh of Clear Vision there, nothing to do with me. Thanks for that Rob [laughs]. Very good, very good, that's the funniest you have ever been in your life.

Rob Thanks for that.

Paul You're welcome.

Rob So, once we have the business owner challenged on this, then the business owner then writes down his or her core values.

Paul But they have done this in the vision day, haven't they?

Rob They have, so now they are working on the core values that they believe in and again in their groups of twos and threes we ask the team to challenge the person on their core values, so that they are part of it and they know how the business is going to be run, core values being the DNA of a business, so they understand it as well.

Paul Have you ever been into a business where you have run this and actually there has just been almost no engagement, there has been...?

Rob No, never.

Paul Right, so in terms of for and against, what have been the percentage splits in the worse case team you ever worked with on this team process?

Rob Within the first three hours, 30-70.

Paul That's 70 for?

Rob No, 30 for, 70 against.

Paul Right.

Rob By about two or three o'clock, I challenge myself and I try and flip it the other way so it is 70/30 and by the end of the day, I normally have got 90/10.

Paul And that is by facilitating and having them out and participating in the dialogue?

Rob Correct.

Paul Anything else?

Rob More mass debates.

Paul Ho, ho, ho. People have paid extra to listen to this you know [laughs].

Rob The other key thing which is part of the trust being built up during the day is that we do a reverse appraisal on the owner of the business, which looks like a series of 20 questions, which each team member scores the owner of the business on those 20 questions from 1 poor, to 4 excellent, so there is a 1, 2, 3, 4 score and then those 20 questionnaires come to Clear Vision confidentially so we do not know the names of...

Paul This is done in advance of the team day, is it?

Rob Yes. It comes to Clear Vision, we put all of those scores and we just number the questionnaires, one, two, whatever the team members are to twelve. We take the average of the scores and so the owner of the business gets a reverse appraisal based on smiley faces being between 3.5 – 4; 3 – 3.5 is a face which is just horizontal and anything below 3 or 2.5, whichever it is, I think 2.5 is a frown so therefore they need working on it.

Then we ask, what do you want the business owner to stop doing, what do you want the business owner to start doing and what do you want the business owner to improve upon? The common theme of business owners is, stop having so many ideas and stop starting so many and therefore implementing none.

The other one is, I wish I knew the direction of the business. Which is why we did the vision earlier in the day. The owner of the business stands up saying, right, my worse scores are these three and therefore I will be working on these three things and normally it is consistency, vision and being available for people, so work on those three things.

Paul You have teed up the business owner to do this, either during the day or before the day?

Rob Before the day.

Paul So, they know what is coming?

Rob Yes.

Paul What resistance do you get from the business owners to this process?

Rob I just say that we won't do a team day unless you do it.

Paul Right.

Rob Because it is part of the trust.

Paul How many then go, well we aren't doing it then?

Rob My theory is if the owner of the business is not willing to stand up and be accountable to his own business, how can you expect the team to be accountable for what they are doing? So, he needs to lead by example and stand up there and take it on the chin.

The next stage is, we have also asked the team member to say what three things would they change or improve about the business. And those, if there are twelve team members, we get thirty-six items, we put that on a flip chart and if there are five people saying lack of team meetings, that is a priority meeting, if there are four people saying consistency of treating team members, then that is the second item, so we try and prioritise what

the feedback is and then we go through them, one by one by one to create action point around, because they need to be heard...

Paul With all the team, in the room when you are action planning it?

Rob Yes, they need to be heard, nobody is having the finger pointed at them, it is all confidential and so we go through one by one by one point up to most of them and then have action points around it and that takes up a lot of the rest of the day and all I am building up there, is the way I frame it up is, the owner has stood up in front of the team, vision mission, core values, challenged, agreed, measured.

Then the principles owner stands up and says okay, this is what I am good at, this is what I need to improve upon, pick these three things and then the team are then saying, this is what we want to put in place and change in the project plan, but at the end of the day, we have got a team on board, knowing where it is going, knowing the core value and they have all signed up to the vision mission and core values, happy days.

And we can go forward and know what measurements we have got to achieve to achieve the vision mission. When we go through the measurements of achieving the vision mission, we actually highlight, so who wants to do this? So, Rachel could be in charge of measuring client delight or whatever, so she has to report on that and measure it each month and report it to the team.

Paul So, at the end of the team day, everyone in the company have got clarity on the vision mission, values, the commitments from the business owner, in terms of how they are going to improve their role, function as a business leader, KPIs for the business, which is connected to the stuff you want to achieve around the vision, we have done the swap, so that is pointed to that from the original vision day. Does the swap show up on the team day?

Rob Of the individuals? No, it doesn't.

Paul Right okay.

Rob That is private to the individuals on the vision day.

Paul Right.

Rob We know the boundaries of what to share and what not to share.

Paul So, just revisiting that side, if you have got two business owners, one can talk about the strengths and weaknesses of the other one, but if there is only one business owner, how do you do that?

Rob We get some feedback from key people.

Paul So, you look to the second in command.

Rob Yes, the second layer.

Paul Right, okay.

Rob It is very rarely that we only do a vision day with one person.

Paul Right, okay. So, we have got goals in place, we have got plans in place, we have got KPIs in place and we have got actions in place.

Rob Yes, just one thing that I remember is that sometimes we get two or three owners of the business and they don't have a shared vision, so what I get them doing is, I get them in different rooms, I get them to write out their vision of where they see the business and then they have to come in and present to each other. I don't move on until there is a shared vision going forward.

Paul All right. So, have you ever been in a situation where you have not been able to reach agreement and you have drawn a line under it and said goodbye?

Rob No, because basically we will work with them to achieve something and...

Paul Do you give them a formula to work to on that vision?

Rob Yes, and I give them a deadline, so if they haven't done things by a certain date, then we go to, okay, well let's look at breaking up this business because it is obviously not going to work.

Paul Right, and have you done that?

Rob Yes. Unfortunately, I have caused a few partnership split ups in my time but it was right for the individuals.

Paul Yes, I can tell the same story. Okay, so we have got what sounds, Rob, like an extremely structured two-stage process, vision day, team day, within four/five weeks of each other. Outcomes which are goals, plans, KPIs, and actions and then after that, what role do you, or someone from the team, play as their trusted business advisor after that?

Rob So, therefore we are then into solution-focused mode and by that I mean, okay, where is the gap in the business to help you put in place and implement these projects and so forth, what training is required? So, we are either going on helping the manager of the business to implement these things on a monthly basis...

Paul Manager or owner?

Rob Whoever we want to work with, whoever wants to be, whoever wants to put these changes in place, so both people or...

Paul Both levels?

Rob Both levels, if the owner wants to do it himself, we work with the owner, if the owner wants to work with the manager, we will work with both of them or the manager. We help implementation process of these changes. If they don't want any assistance, then I go along on a quarterly basis in the form of a board meeting to make sure they are actioning the projects and basically they are accountable to me, to make sure that they are putting things in place.

Paul How do the business owners respond to being held to account by you?

Rob They call me the headmaster because they think they've got to do their homework by the time I get there. Most of them like it because they suddenly get sucked back into a day to day reminder of the vision, reminder of why they did the vision day or the team day, to make sure that projects are prioritised and put in place and if there's a lot to be done, we just pick three or four projects in a three-month process and then make sure that we discuss, implement and go forward in that.

Paul So, there is the quarterly board meeting, for want of a better description, and holding to account of stuff they are implementing themselves. But you hint that sometimes you even go in, or your team go in, to tackle certain aspects. Just run me through what that involves.

Rob It could be how to run a team meeting. It could be to put the measurements in place, it could be that they have got a difficult conversation with one of the team members. It could be that they are struggling with copy writing on their website. It could be that they don't know what their marketing strategy is. It could be that their sales conversion process is not being measured etc., etc. So wherever they have a problem, we can always give them a solution and bring empathy into the process to make sure it is all right on both sides. So, we fit into that mode.

Paul We fit into that mode?

Rob Sorry we fit into that mode, we fit into that gap which is missing in the business.

Paul Right.

Rob Originally, I had 31 modules of the living consultancy and I was going to deliver them, specific to the business owner, to see which one delivered but you cannot do that, you have to go with the intuition of listening and

then going through with what has happening in the business at the present time and then deliver value, because that solves their key problem and gets their mojo back.

Paul So, is that a case of pursuing mostly problems, limitations and fixing them or is it opportunity based...?

Rob Both.

Paul ...and making the most of?

Rob It's both.

Paul Is there a bias out there, Rob, is it a 50/50 split or...?

Rob If you do a spot analysis, you would say, well threats you can't do much about, because they are out of your control, strengths are strengths, you can only enhance them, so what is left? Opportunities and weaknesses. And then you get a mixture of the two to see which ones are the priority items out of the opportunities and weaknesses, and work on a mixture of those things.

Paul So, let's say you are in this quarterly board meeting cycle, how long are board meetings?

Rob They are either all day or half a day.

Paul So, they are big, lumpy meetings then?

Rob Yes, so they will...

Paul And who drives the agenda?

Rob I don't have an agenda.

Paul You don't have an agenda?

Rob No. I listen. So, I go in and the first question I ask is, how are things? Listen, listen, listen, listen and ask them questions and then that creates an agenda for the day, really.

Paul Right, so vision day, team day, previous commitments from previous meetings if they show up.

Rob Yes, they show up but I don't want to make it processional, so I don't go in there saying, right, let's do vision from 9:00 till 10:00, personal goals and this, that and the other kind of stuff. I really just go in there and say, how are things doing? And then I go to personal goals to see what they are achieving, then we go to key issues in the business or where the opportunities are to discuss them. Then normally in the afternoon we bring the team members in as well, to involve them in the process so that they can have their say on the projects that have been implemented.

Paul And the continuity from the team day.

Rob Correct. And more so, now I think we are going to quarterly meetings in the half days, where they are run two or three times a year, rather than four times a year we are definitely doing the whole day meetings.

Paul Right.

Rob So, it sounds as though this is a kind of a one year project and then you are out. I have now got clients that have been going for eight years because they always want me to challenge them on the goals for 2017 and then go for a mini vision day at the start of each year, calendar year, and then you set what goals they want to do and set the measurements and then it rolls on again.

So I originally thought this was going to be a one off cross-sale and now it is a regular part of my gross recurring fees and therefore I can say, hand

on heart, my worst consultancy year has probably been 120 and the best consultancy year has been 200k, personally.

Paul Tied to you?

Rob Tied to me and obviously, the team are doing... I have trained the team now to deliver more consultancy around the project plan in particular and now four people, including myself, can now deliver team days.

Paul What about vision days?

Rob Sorry, four people can deliver vision days and three people can deliver team days.

Paul Oh, right.

Rob So, I am passing that on as well, and that is good and they want to do it as part of their career progression, to do a vision day and a team day.

Paul So, how have you helped them develop that insight, institution, skill, process?

Rob They sit in on all my vision days and team days and then they write the minutes up and then understand the process once or twice or three times or whatever they want and then they can do one by themselves.

Paul And do they do that by themselves with you watching them or do they do it without you there?

Rob However they want to frame it up. Some people find me intimidating and don't want me there, which obviously, you will agree with, Paul.

Paul Ugly maybe, intimidating... [laughs].

Rob It is however they want to do it. And also, the younger team members, if they say they want to start a consultancy day then we put them in as well.

Paul So, who is best out of the team then? That's not you. Or have you seen them all evolve and improve?

Rob Evolve and improve yes, I think Matt is definitely good at the vision day, I think Dean is good at team days.

Paul Is he, so he is good at calling people out and getting them to contribute?

Rob Yes, it is just asking those questions which sometimes need to be asked.

Paul And not bottle it.

Rob Correct.

Paul There is a bravery element to this, isn't there?

Rob Correct, yes.

Paul There is a bravery element in making the decision to be a business advisor and it is a theme that has come out in the other interviews, Rob, you can't bottle certain questions, it needs to be on the table.

Rob Correct and at one point I did bottle questions but I thought, this is ridiculous, clients need to get value out of me, so therefore I need to ask them questions that come to me intuitively.

Paul Yes.

Rob So, the consultancy process has definitely delivered a whole different... sorry a unique different area for us and initially I had accountancy clients that I did consultancy on and we got value that way and long clients still

going. Then I picked up consultancy clients which came to accountancy clients.

Paul So, just to clarify that, so you have accountancy clients that essentially then went on to buy advisory consultancy?

Rob Advisory, yes sorry.

Paul And then you won advisory clients, not accounting, that then turned into accounting clients too?

Rob Because the trust built up, always gave the current accountant a chance to deliver things like management accounts or whatever, forecasts. If they didn't deliver, then they came across to us. So, most of the clients now are accountancy clients, advisory clients and mostly accountancy clients, and that is what... In our marketing process and in our sales process, we are looking for ideal clients who actually want both the accountancy and the advisory and so we are looking at a minimum level of fee of £6,000 or £7,000, average value and potentially going up to £10,000, £12,000, £15,000.

Paul Okay. At this moment in time, what is your largest client paying you in a year?

Rob On advisory?

Paul Total. I want the split anyway.

Rob One client.

Paul So, one client, your biggest client.

Rob £20,000.

Paul And then the split between accountancy and advisory, in the £20,000.

Rob On that one client, so it will be £15,000 and £20,000 advisory.

Paul I see, it is a £35,000 client.

Rob Yes.

Paul So, a £35,000 client, £15,000 advisory, £20,000

Rob Yes, and then we have another client..

Paul Sorry which way, just for clarity £20,000...

Rob Advisory.

Paul £15,000 accountancy.

Rob We have another client who is £45,000 accounting.

Paul £45,000.

Rob And £9,000 advisory.

Paul Right.

Rob And then, accounting with management accounts, all kinds of stuff.

Paul So, let's just take those two clients, of £45,000 plus £9,000 so £54,000 and £35,000. What size businesses are they?

Rob The £54,000 one is a vet practice with six sites and is turning over £3 million and the other one is a manufacturer of explosive devices, which is turning over £3 million as well.

Paul Right, okay and what is the smallest client that you have worked with that has brought significant, for them, advisory work, vision day, team day?

Rob We have got some clients turning over half million and they are basically paying us £12,000 which is a split of £6,000 accounting, £6,000 advisory.

Paul Right, cool.

Rob So, the reason why I wanted to do advisory is because it fits into my core purposes of, let's start off a conversation, it is because I care to make a bloody difference, that is what it is all about.

Paul So, what do you get out of it then? The question is not about the money and the fees.

Rob It is basically the warm feeling of making a difference, a great feeling of making a difference.

Paul Is that embedded across the firm?

Rob Yes, I mean we are nurturing accountants to become advisory and bit by bit they are getting it, so they understand creating a difference and making their day, basically.

Paul So, I would like to now... two last sections really. One is a specific story, the position they were in before you did advisory work with them, how they got involved with you and Clear Vision, how they then did what they needed to do to change the business and the results that came. That journey from doing fine but frustrated or in the shit, or whatever, so it is like, choose one.

I don't want the name, but just a little bit of background, so we can get a sense of the real people involved and what was their story, the journey and Clear Vision's role in influencing the outcomes.

Rob So, a client in Sheffield, that was a dental partnership, one person was 44 and the other person was 60. So, we started off with a vision day in one of the partner's houses and I ran a session about personal goals and business goals and the vision and then the personal goals were very different because of the age gap and we had to listen, well we listened to the elder partner to see what he wanted to achieve and then because of the age gap there was an issue around vision which he did agree in the end.

Then we set up some time frames of the younger partner buying the older partner out and I'm guessing the property out as well. The older partner was definitely causing some stumbling blocks in achieving the vision. The

timeframe came along after one year and then the younger partner bought the older partner out for an agreed sum. The older partner still keeps working there, he bought the property in his pension fund as well, two ticks in the box, done straight away.

Paul Twelve months?

Rob In 12 months. The next tick in the box was for the younger partner basically to run the business to achieve his vision, so he held a team day and for the next three years, we helped grow the busy from x to y, still paying the...

Paul What does x to y mean in percentage terms?

Rob Sorry, it is going to be from another 50% of turnover increase.

Paul Half as big again?

Rob Half as big again but being more efficient at the same time.

Paul So, does the cost base go up as well, or...?

Rob No, it is being more efficient, more efficient, yes and then putting things in place regarding the client journey as well.

Paul Given that we don't know who they are, what were they turning over to begin with and what...

Rob They were turning over from £400,000 to £600,000 and fixed overheads were all covered so that's purely, gross marginal profits. Now the owner did really well in taking the team forward and growing it and to achieve his goals. He wanted to pay off debt in the business, which he paid off. Once he paid off the debt in the business, from paying his partner out, he paid off the debt and the pension fund, so the property was paid off and then it was about achieving his personal goals as well.

So, he wanted to pay off his home mortgage. So, in one of the sessions I said, well why didn't you buy a property abroad because he wanted to do it and so I showed him a way of doing it and therefore he bought a property abroad. Then there was a mortgage of, I think £200,000 or £300,000 I think from memory and then when I met him last year, then I said to him because he was then...

Paul So, where are we on the journey?

Rob He was 51 by now, so seven years later. And I said, right, people are selling their businesses up now and staying because of the [Euronet 00:30:29] basis, why don't you consider it now? Well, it's five years too soon. I said, well just listen to the people. So he had a few meetings with potential

enquirers and then he did a deal within six months of actually suggesting it.

So, then it took quite a long time to get the deal completed, another six months, so then he got a lump sum, which was a nice tidy sum and he paid off his mortgage and he paid off what he had in Spain as well. Then I met him again and said, okay, what is the next goal, what is going to happen in three years time, how is it going? Not happy at all, change of culture there, wanted to go straight away, after six months, foregoing sale proceeds.

Then we helped again to actually get him out of that situation, worked out all the money for him, worked out what his taxes would be. So of 10th November 2016, he left his practice finally and on 11th November 2016, he moved to Spain and is now living there and learning Spanish and learning the Spanish guitar and playing golf, at the age of 52.

So, an eight-year journey, of which some of it was frustrating because he had to kind of wait to buy his partner out and that is a great story of how we have helped somebody in Clear Vision.

Paul Brilliant. There was a repeating theme which is around personal goals, business goals and the values piece as well I can hear there. You are almost asking the same bloody questions time and time again, at different times in people's... and the value doesn't diminish as a consequence.

Rob You said something today about relevance and timing, and relevance and timing is absolutely key to this and this is where your client contact has to

kick in to make sure that relevance and timing, you are always there to be relevant and timely, so that you can give advice.

Paul It is interesting, listening to one of your consulting calls earlier today and even in this conversation, it has been really, ask great questions, get the information out and get them to make commitments and get on with it. There is no advice there but the call today, there was. So, there is a blend of the Q&A stuff, which is almost coaching, isn't it? So, right question, right time, relevant question, right time.

Rob I don't force my opinion on them but if they ask my opinion... if they ask me, that's good but if I don't feel we are getting to the core issue, then I will give my opinion.

Paul Yes, and you give your opinion, are you telling them what you think they should do, you get off the fence...

Rob I do, I say, in my opinion, I say, if you are selling your shares in the business which is the family crown jewels, you want to be very careful how you are doing this and I would suggest a step by step approach, let's meet up and discuss it, which is what has happened.

Paul Cool, okay. So, to wrap up then, I am after the rules of thumb of being a trusted business advisor. So, for example, and the listeners will be sick of

this story but a carpet fitter comes to the house and I watch what he is doing and he measures once, makes a note, measures again, makes the same note and then starts cutting the carpet. Why has he done that twice? It's just a rule of thumb, measure twice, cut once, then I am absolutely certain I have got it right.

So it's a rule of thumb for fitting a carpet, so it is not necessarily the best analogy, but at least it points out... And what I am fishing for, Rob, is, what are the rules of thumb to being or rather doing and being a brilliant trusted business advisory accountant?

Rob Firstly, it is having a validation process to make sure you work with the right clients.

Paul Choose the right clients?

Rob Choose the right clients, choose the right clients, choose the right clients.

Paul How do you determine whether you are choosing the right clients?

Rob We actually do a process called DISC whereby the potential advisory clients fill in a profile.

Paul This is the Thomas International Disc profile?

Rob Disc profile, yes.

Paul Right, okay.

Rob So, they come out as a high D, as in very dominant; high I, inferential sales and so forth. So, what comes out from the profile, we know how to deal with them and work with them, in an ongoing basis. We had two high dominant people, doctors, and I said I didn't want to do it, and in the end the beautiful Romanian lady said that she wanted me to do it, so I caved in and all meetings were like world war three every time.

So, validation, validation, validation, use every process you can, meet with them, meet with them, meet with them, discuss with them and see if you want to work with them.

Paul So, build the relationship?

Rob Build the relationship, build the relationship, build the relationship.

Paul Build the trust?

Rob Correct.

Paul And actually, have we got the right profile or balance of business owners, that will take the action and make the vision a reality?

Rob Correct. So, find the right client, ask the right questions, don't sit on the fence, ask the right questions, listen and make sure accountability is everywhere and measurable.

Paul Which is part of the accountability isn't it?

Rob Yes.

Paul So, you have got accountability measures... so you have got to have that... KPIs, you hold great swathe in KPIs?

Rob KPIs as long as they are measuring the right information.

Paul What do you mean by that?

Rob The measurements that have been agreed to measure the vision and mission, which is what we have already done earlier in the process.

Paul Yes, yes. I have this thing, there are outcome measures and input measures, there are activity measures, input and then the performance, so

I have got this thing around, well you have got key performance indicators outcome, you have got key predictive activity input measures. Where is your preference?

Rob I am about outcomes. So, it is basically to have...

Paul Which is the goals outcome?

Rob It is all about the goals, the goals, the goals.

Paul But the activities, the team and what is going on week in, week out?

Rob The goals are the highest level, in my view, and the activity bit is below that in making sure the activity is systemised and accountable, relevant and so forth and so that people can do it, so that is one of the goals.

Paul You can't have one without the other really, can you?

Rob No, and one thing which you mentioned today a couple of times is trust, trust, trust. If you say it in the right language and say it with empathy and care and coming from the right angle, rather than in any different way, you are building up trust the whole time and they know that you are on board to help and help them achieve their goals.

Paul You have got to measure, you have got to hold them to account, therefore... I guess I am doing what I can to put words in your mouth, I don't mean to, but you have got to be brave to do that, haven't you? And you've got to get off the fence, getting off the fence is definitely...

Rob There is definitely a confidence issue around this as well, you need to have the confidence to ask the right questions, get off the fence, basically and then listen to the responses and gauge responses and then go again, go again and go again.

Paul Ask again, ask again.

Rob I just liken it to, you're going down a round and then you go off and then find, you come to a roundabout, then you go around again, you come back, you go off the road again, you come round to a cul-de-sac, and you have got to come back again and then you think you have found the right route to the question, to the right issue.

Paul So, you ask a question, might not be the right question, might not be the answer, so you keep coming back to it.

Rob I have learnt that basically don't say your first thought, listen to what your thoughts are saying and then say it. So, meaning, you have got knee jerk

or you have got actually thinking about, coming out with the right kind of question.

Paul It almost sounds like measure twice, ask once.

Rob Yes, that is a fair comment.

Paul And you might ask it so that you revisit, so you are asking and then asking them the same thing in a different way, same thing in another different way, almost like you are looking through a prism, between three different ways, you are asking three different questions on the same issue.

Rob Correct and people are very good at going off on tangents and you have got to remember what the original question was, otherwise they will go off on a tangent as well.

Paul And they can take you off and then you...

Rob Correct and then you have lost your focus.

Paul And arguably you drop out of being trusted business advisor as well.

Rob Correct.

Paul Brilliant.

Rob And sometimes, just to finish off, is that where they are not actioning or their focus is not there, sometimes we have gone in monthly for half day meetings to get involved in the operations of the business to make sure they actually focus on the right stuff. For an interim period, going in for six months for six monthly meetings, then going back to quarterly.

Paul Yes, build some momentum and...

Rob Yes, because they are not doing it themselves, they need a kick up the bum to make things happen.

Paul You don't do it for them, do you?

Rob No, but I will be in the meetings, so if we are having a meeting with the team about something, I will be in there putting my oar in, basically.

Paul Can you remember when you first started with all this, the business advisory, I don't know if you can cast yourself back to starting on the journey, because some people are going to read this and listen to this and be going, well it's all very well for Rob, he has been doing it for a decade or two decades. Where is the starting point, do you think?

Rob The starting point...

Paul So they're an accountant.

Rob Yes.

Paul They have got all these business clients whether it is 20 or 200, or 2000 and there is clearly an opportunity to deliver great value trusted business advisory guidance, advice, whatever you want to call it, but where is the first step?

Rob So, a client of mine asked me to go in and initially look at the financials of...

Paul Are we talking about your early experiences, are we?

Rob Yes. So, then I did that and he said, well can you help me with the marketing side of the business? So I went in and helped on that. Okay, measurements, there was something I am happy with, some measurements...

Paul Something you are comfortable with, some numbers. If you are comfortable within numbers, then I can...

Rob They asked me to attend the board meetings to see what the strategy was and there were three sales people, a technical person and me, so that is challenging, having sales people on the board. And then, bit by bit, he got me more involved with the business. So I was working there for two or three days a week and actually learning on the job, so to speak, doing appraisals, doing this, doing whatever.

And so we grew it from a million to £4 million and it has just got taken over, they got too big and I had to say, hang on a minute, I need to go back to my... I ended up being involved in my business because it was suffering. So that was one of it and then I worked with a partner in a business who was running a consultancy section as well, so that helped another part of it as well. Bit by bit, I just took on...

Paul Did you recognise at time that you were on this journey or was it just, you were just doing what you were doing?

Rob I was just doing what I was doing and it dawned on me, thinking that, hang on a minute, this is actually a service that people will actually want and require and I thought, this is ridiculous, therefore, and I was supposed to be the advisory person for the whole of a big firm that I was a partner in and then the client, the partners, wouldn't allow me access to their client base and so it all fell out of bed and that is why we left to form Clear Vision.

So, it really is putting yourself into position whereby you are going in to do this and learning a bit more and learning a bit more and if you go in on a

30 module, and say do one, do two, do three, do four, do five and the problem is at number eight, then you don't get to number eight for whatever and by that time, they have paid a lot of money and they get no value.

Paul One of the rules of thumb is, cut to the chase, get to what needs to be sorted out, whether it be opportunity based or challenge/problem based.

Rob But I challenge the accountants to, in a year end clearance meeting, they can ask a load of questions as part of the vision day to actually start the process of where a client is, and then say, well how are you going to do it? And then you can hold a free of charge board meeting which then puts less pressure on yourself.

Paul And you would have those questions on goals, vision, personal goals?

Rob Not too much but basically you say an hour of questions, drop some value in there and say, okay...

Paul Do you think you need an hour?

Rob Depending on... it could be half an hour, it is not that. But it is dropping, it is dangling the carrot and so then they want you and then you offer a free

of charge board meeting and then you deliver that and suddenly you should be in there, if you asked the right question and delivered.

Paul The reason I ask the question about when you first started, it is interesting that you go, well actually I am comfortable measuring numbers, sales and marketing numbers are still numbers, essentially, so would you go with that? Ask decent questions about the numbers that drive the future success of the business.

Rob Correct, accountants always account by numbers so just start with that and then just expand outwards.

Paul Brilliant, brilliant. Last one, then we are done. The three most impactful or most recommended books?

Rob That is easy. Paddi Lund.

Paul He had a few books, didn't he?

Rob The Happiness Centred Business.

Paul Right okay, that is ancient history but it is brilliant.

Rob Jim Collins, From Good to Great and Michael Gerber, The E-myth.

Paul So, at the minute, Good to Great is outranking everyone and second is The E-Myth.

Rob So, those are the three books.

Paul Right, I thought you were going to mention the Bernadette Jiwa...?

Rob No, you said it, the three books that I started with.

Paul Yes, yes.

Rob So, this is what I started with and since then Bernadette Jiwa, Love of Marketing is definitely one as well.

Paul Brilliant. Thank you, Rob, very much. I really appreciate you being so generous with your time and your insight. Thank you.

Rob No problem at all, Paul.

Paul And thanks for the funniest line yet in an interview.

