



 Rootworks

The Business Model Basics

an online workshop

The Modern Firm

A modern firm has made the choice to simplify operations and focus on offering services they are passionate about, and to run a high-performing, highly profitable and scalable business.



WHAT DO WE KNOW ABOUT
ACCOUNTING FIRMS?

Every firm is different.





WHAT DO WE ALSO KNOW ABOUT
ACCOUNTING FIRMS?

They all have many of
the same challenges.



Business Model Basics is the roadmap that a firm can use to chart and track their journey to becoming a modern firm.





Each task that a firm completes is a result. That result helps the firm to improve.





The Business Model Basics Roadmap has 13 elements

1. Culture
2. Client Onboarding
3. Ideal Clients
4. Client Accounting Model
5. Payroll Model
6. Business Tax Model
7. Individual Tax Model
8. Advisory Services Model
9. Practice Management
10. Security
11. Marketing & Sales
12. Client Communications
13. Web & Mobile



Business Model Basics

Business Model Basics is a collection of 13 elements. Each of the 13 elements is organized into a series of tasks. Think of Business Model Basics as a roadmap. The Business Model Basics are the roadmap that member firms can use along their journeys. Completing each Business Model Basic task is a result and each result brings a firm one step forward to becoming their modern firm.



42%
completed
60 / 140



Ben Gabriel ▾

9 / 10



Culture

Start

5 / 8



Client Onboarding

Start



Ideal Clients

Start



Client Accounting Model

Start

2 / 9



Payroll Model

Continue



Business Tax Model

Start

11 / 12



Individual Tax Model

Start

8 / 9



Advisory Services Model

Start



Practice Management

Start



Security

Start

16 / 17



Marketing & Sales

Start

9 / 10



Client Communications

Start



Web & Mobile

Start



Online Learning Library

Browse all topics and find resources to help guide you along the way to becoming the best firm you can be!

Explore Now



Each of the 13 elements is comprised of a series of tasks

Culture, for example:

1. Review the 4 C's of Culture
2. Define your firm's vision and values
3. Ensure that staff understand the firm vision and values
4. Implement regular staff meetings
5. Implement a formal staff review schedule
6. Implement an annual firm retreat
7. Implement a new staff onboarding process
8. Establish a culture leader
9. Implement an employee appreciation program
10. Implement an annual plan to evaluate the health of the firm's culture



+ New

Dashboard

ClientView >

Communication >

Website >

Community >

Resources >

Business Model Basics

Business Model Basics is a collection of 13 elements. Each of the 13 elements is organized into a series of tasks. Think of Business Model Basics as a roadmap. The Business Model Basics are the roadmap that member firms can use along their journeys. Completing each Business Model Basic task is a result and each result brings a firm one step forward to becoming their modern firm.



Ben Gabriel ▾

9 / 10



Culture

Start

5 / 8



Client Onboarding

Start



Ideal Clients

Start



Client Accounting Model

Start

2 / 9



Payroll Model

Continue



Business Tax Model

Start

11 / 12



Individual Tax Model

Start

8 / 9



Advisory Services Model

Start



Practice Management

Start



Security

Start

16 / 17



Marketing & Sales

Start

9 / 10



Client Communications

Start



Web & Mobile

Start



Online Learning Library

Browse all topics and find resources to help guide you along the way to becoming the best firm you can be!

Explore Now



All Tasks

Completed (9)

Related Events (3)

Featured Resources



6. Implement an annual firm retreat

Recommended resource: [Firm Meetings, Team Retreat Ideas and Sample Agenda | Guide](#)

TASK STATUS

Completed

Updated April 28th, 2021



7. Implement a new staff onboarding process

Recommended resource: [Staff Management | New Staff Onboarding](#)

TASK STATUS

Completed

Updated April 28th, 2021



8. Establish a culture leader

Recommended resource: [Establishing a Culture Leader in Your Firm | Lesson](#)

TASK STATUS

Completed

Updated April 28th, 2021



9. Implement an employee appreciation program

Recommended resource: [Employee Appreciation Program | Guide](#)

TASK STATUS

Completed

Updated April 28th, 2021



10. Implement an annual plan to evaluate the health of the firm's culture

Recommended resource: [Implementing an Annual Plan to Evaluate the Health of the Firm's Culture | Guide](#)

TASK STATUS

Completed

Updated April 28th, 2021

A woman with brown hair tied back, wearing a white long-sleeved shirt with thin black horizontal stripes, is looking down at a black smartphone held in both hands. She is standing in front of a large window with a view of a modern office interior. The background is slightly blurred, showing office furniture and a bright, airy environment.

WHAT WE BELIEVE

**Business Model Basics is
empowering accounting firms**



Culture





Client Onboarding





Ideal Clients





Client Accounting Model





Payroll Model





Business Tax Model





Individual Tax Model





Advisory Services Model





Practice Management





Security





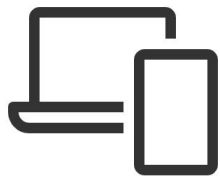
Marketing & Sales





Client Communications





Web & Mobile





8 / 10



Culture

Continue

5 / 8



Client Onboarding

Start



Ideal Clients

Start



Client Accounting Model

Start

2 / 9



Payroll Model

Continue



Business Tax Model

Start

11 / 12



Individual Tax Model

Start

8 / 9



Advisory Services Model

Start



Practice Management

Start



Security

Start

16 / 17



Marketing & Sales

Start

9 / 10



Client Communications

Start



Web & Mobile

Start



Online Learning Library

Browse all topics and find resources to help guide you along the way to becoming the best firm you can be!

[Explore Now](#)



BENEFITS OF FOLLOWING A PATH

1. Better focus
2. Planning is more effective
3. Answer the question: *What do I do next?*
4. Creates visibility within the firm to see what initiatives you are working on
5. Track results and celebrate accomplishments!



[What you get](#) [About](#) [Membership](#) [Resources](#) [Success stories](#)

[Member login](#)

[Get a demo](#)

Run a better accounting firm.

Firm improvement starts here.

Harness the power of your client data, build a cloud-based tech stack, enhance firm culture and create a powerful online presence—all in one place.

[Get a demo](#)



Questions? Please email membership@rootworks.com or click **Get a demo** at rootworks.com



The Business Model Basics

an online workshop