

Vision +
Planning
*Your Future Is
In Your Hands*



Sandra Wiley, CEO

Sandra Wiley Strategies

My Passion:

Inspiring Clients to create an amazing future for themselves, their team, their firm and the profession.

Professional Highlights:

- CPA Practice Advisor Top 25 Thought Leader
- Top 25 Most Powerful Women
- Accounting Today Top 100 Most Influential
- Leading Edge Alliance on the Edge Innovation Award
- Maxwell Certified Facilitator

Author Of:

- “The Journey Ahead: A new Roadmap to Collaboration in your Firm”
- “The Engaged Employee”

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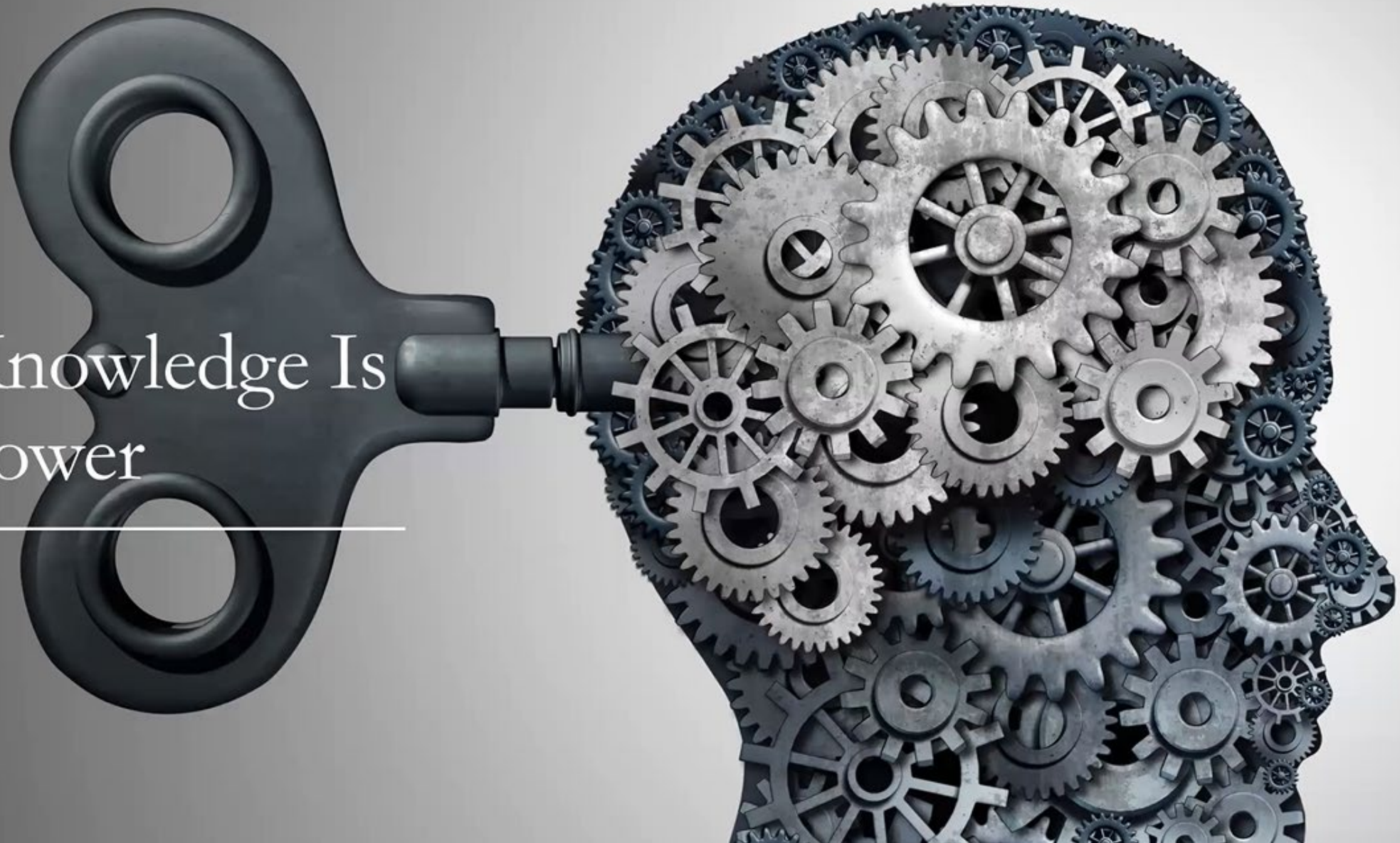


Core Outcomes Today

Leave with new wisdom about why a Vision and Strategy are imperative to a fulfilling future.

Why intentionality and teamwork are important.

Knowledge Is
Power



Let's not
start like this!





Where are
you
spending
your time?

Vision -

CLEAR – INSPIRATIONAL – INTENTIONAL

Strategy

CONNECTS THE VISION TO REALITY



Tale of Two Firms



We Are Limited,
Not By Our
Abilities,
But By Our
Vision



1. Commitment



2. Courage



3. Capabilities



4. Confidence

VISION



Creating the Vision

- ✓ Who
- ✓ What
- ✓ Where

Visioning Pillars

Leadership

Talent

Operations

Growth

Technology

Strategic Levers

Leadership - # of goals achieved

Talent – Retention

Operations – Revenue and Profit

Growth – Ideal Client Retention

Technology – Security Training Attended

Strategy —
One Year At
A Time





There Is No
Elevator To
Success, You
Have To Take
The Stairs!

Considerations:



ADD MORE
PEOPLE



STRATEGY – NOT
TASKS



PILLARS ARE THE
ANCHOR



DUE DATES



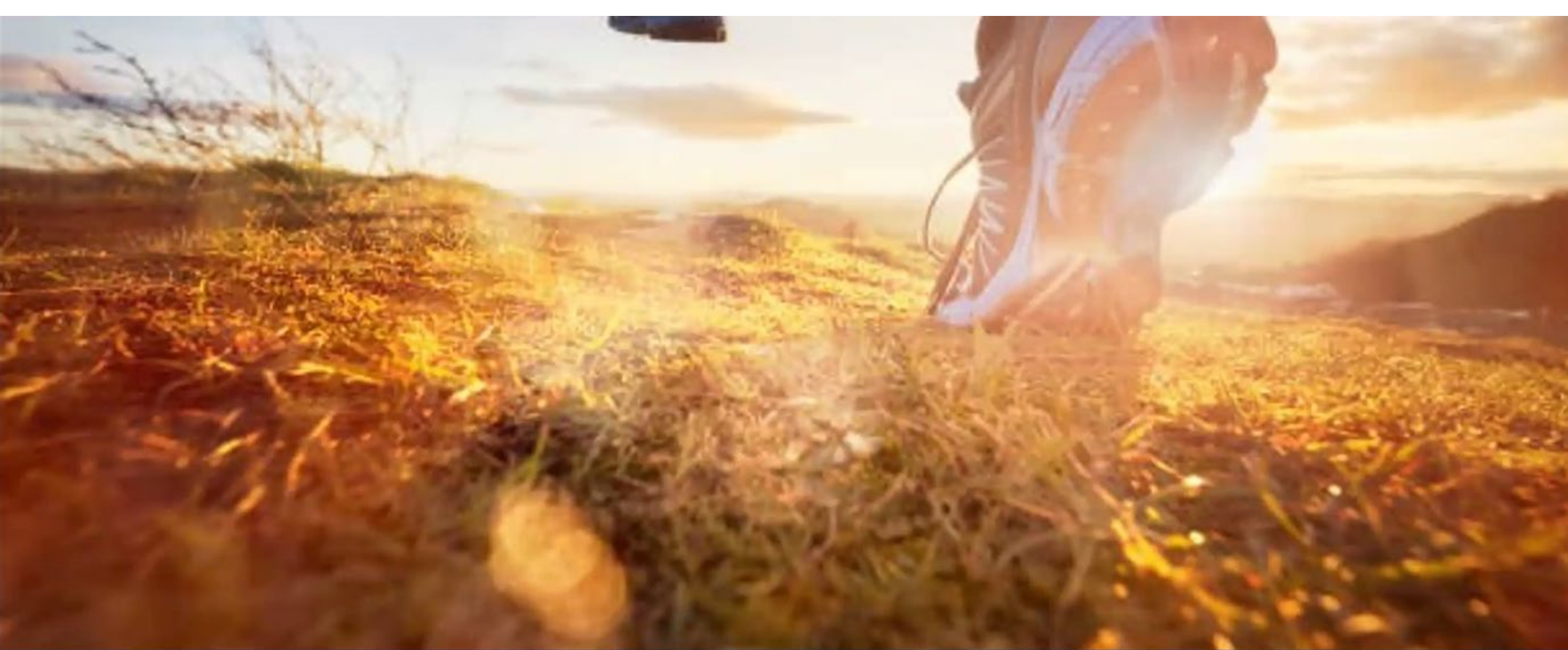
CHAMPION/LEAD



ACCOUNTABILITY

Tools and Exercises





Sprint and Sustain

IT IS ALL ABOUT
EXECUTION

Tips and Tricks



Talk it



Print it



Accountability



Communicate
a lot



Communicate
often

Common Traps

Too Many Strategies

No Champion

Ignoring What is Right In Front Of You

Technology Paralysis



If You Don't
Create The Future,
You Want

You Must Endure
The Future You
Get!

Sandra Wiley

Do You Have Questions?

Contact me:

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