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## Purpose Isn't A Marketing Strategy

Building an Impact Organization  
That Endures

Don't Leave Your Best  
Clients to Chance

Build a Referral System That  
Provides Something Useful

From Ledger to  
Leverage

How Accountants and  
Bookkeepers Can Persuade  
with Confidence

Sometimes You Have to Break  
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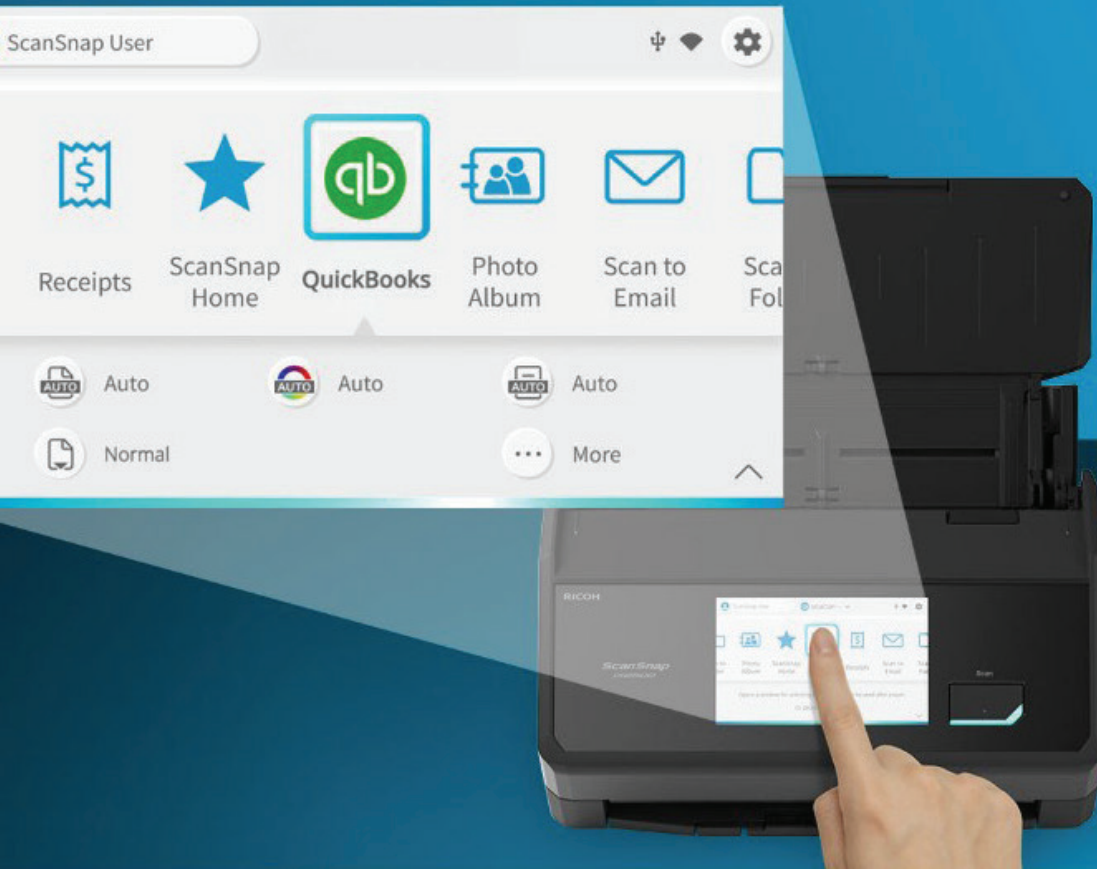
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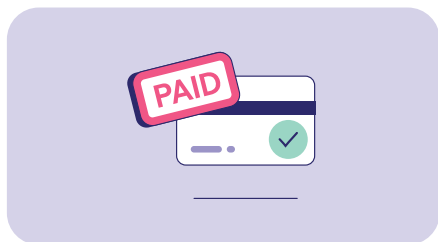
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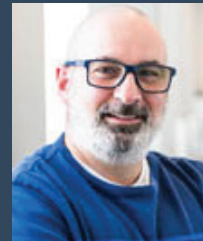
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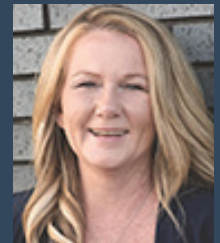
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**By Rick Johal, CAE, MPA**  
CEO  
Certified Professional Bookkeepers of Canada

# Beyond the Numbers

## Why Your Bookkeeper's Well-Being Matters

Bookkeeping professionals are celebrated for their precision, focus and skill in managing multiple accounts while meeting tight deadlines. While they dedicate themselves to maintaining their clients' financial health, they often overlook their own mental well-being. Each May, during the Canadian Mental Health Association's (CMHA) Mental Health Week, we have an opportunity to reflect on the unique pressures this profession imposes and the importance of supporting those behind the numbers.

### The Hidden Pressures of Bookkeeping

Bookkeepers and accounting professionals face relentless pressure. The rush of tax season, payroll deadlines and month-end reports creates an environment where high stress levels are the norm. In our results-driven world, we often prioritize outcomes over the well-being of those doing the work.

The challenges are real and significant. The constant demand for timeliness and accuracy can push professionals toward burnout. Fear of not meeting



expectations may be mistaken for incompetence by clients or employers. For solo practitioners, this pressure can feel even more isolating, especially without a strong support system.

### Tackling Loneliness and Isolation in the Profession

This year, CMHA's Mental Health Week highlighted the impact of loneliness on mental well-being. Bookkeepers, who often work independently or in high-pressure environments, commonly experience isolation, which can severely affect their mental health. Loneliness isn't just about being alone; it's about

feeling disconnected from support, whether in the workplace or in client relationships.

Addressing this sense of isolation is crucial and it's important to recognize that not all coping strategies are sustainable. Fostering genuine connections by reaching out to colleagues, joining industry networks or sharing experiences with peers can help reduce stress and feelings of isolation. Mental Health Week served as a reminder that meaningful connections not only combat loneliness but also strengthen mental health, which is essential for the bookkeeping profession.

## Why CPB Canada Supports Professional Wellness

At CPB Canada, we support mental health because it is central to ensuring healthy and capable professionals. Think of it this way: you can't get expert advice from someone who is running on empty, just as a business can't succeed without the right resources.

When professionals burn out, the industry loses valuable talent and experience. The profession's brand weakens and attracting new generations becomes increasingly difficult. There are countless reasons why mental health support is foundational to a bookkeeper's career. By promoting a supportive focus on mental health, we believe our members can build sustainable,



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fulfilling careers and not just survive the next deadline.

### Bringing about Change to Canada's Accounting Industry

Meaningful change requires collective action. We must work together to eliminate the stigma or the "look away" culture surrounding mental health in Canada's accounting industry.

Each May, your association is committed to providing education and access to resources that

support your mental health journey. While much remains to be done, we believe this is the minimum your professional association can offer.

This year's Mental Health Week was a reminder to help build an industry where well-being is valued as highly as a balanced budget. Investing in mental health will benefit every professional, their clients and the long-term success of the businesses they support. 🌈

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## Message from the Board Chair



By **Melissa Lenos**, CPB, PCP  
Board Chair  
Certified Professional Bookkeepers of Canada

# Business Continuity and Security in Bookkeeping

## A Practical Guide to Staying Operational and Protecting Client Data

As bookkeepers, we sit at an intersection of cash flow, payroll deadlines, sales tax deadlines and highly sensitive client data needed to complete our work. Downtime is not an option, but life happens.

Are you ready? Is your firm ready? Are your clients or employees ready? Illness, family emergencies, security incidents and software issues all play a part in our everyday lives so we need plans and controls in place to reduce risk for our business and our clients' businesses.

**Continuity** can mean many things. For a bookkeeper or firm, it means keeping critical services running or restoring them quickly after a disruption. **Information security** requires protecting confidential information, maintaining its integrity and ensuring the availability of the data, systems and workforce that run them. Without clear processes and a plan, these two priorities can overlap in unintended ways, leading to avoidable failures in our business.

**Quick Risk Check:** What can stop your practice in its tracks next week?

Do you have a list of “can’t-miss” deliverables? These include payroll cutoffs, sales tax filings, payables runs, bank reporting or tax-filing deadlines.

Identify your single points of failure; for example, no hardware replacements available or only one staff member/owner with admin access.

When you create your business continuity plan, start with two questions: How fast do you need to be back up and running and how much data loss can you afford? Then choose your top five scenarios to plan for (for example: phishing takeover, device loss or a key person becoming unavailable).

**Backups** are an easy way to reduce the impact of data loss. When your data exists in more than one place, you can recover more quickly during outages. First, map where your data lives: accounting platforms, document storage, email, payroll apps,

practice management tools, SharePoint or Google Drive. Understand your software retention policies, any internal backups and your ability to review historic versions. Then, research and implement external backups that protect your client data.

**Account security** is fundamental to business continuity. Simple steps you can put in place include turning on multi-factor authentication (MFA) for every login that supports it. Use authenticator apps where possible or use company-owned SMS/email when authenticator apps are not allowed. Store recovery codes in the company password manager and limit access (don’t share them with all employees).

When choosing passwords, use a generator and never reuse a password. Ensure each employee has their own logins to each system. Use sharing rules in your password manager so passwords can be used without being changed or viewed by unauthorized people.



Ensure you have an incident response plan; documentation is key. Decide whom you call when there is an incident (insurance company, IT team, manager), how you triage, what you need to shut down or turn off and how (and to whom) you communicate. Document everything during the incident, including timelines, actions and outcomes.

Creating a business continuity plan is a big job and implementing it is next. As we move into our slower season, consider choosing two things to improve each month. Over the next six

months, you can build a strong foundation for your business continuity plan.

Here is a checklist to get you started:

- Turn on MFA for all apps, including email, accounting software, document storage and bank portals;
- Use a password manager for passwords and recovery codes and designate an emergency contact;
- Create a master list (and calendar reminders/workflow board) for all important deadlines;

- Implement backup procedures for accounting systems, email and primary files;
- Verify backups are working (and test restores periodically);
- Document client how-to guides/client manuals/client instructions; and
- Create a policy for password length, usage and sharing.

Start small, but start now. Build your continuity knowledge, write the plan and stress-test it before you need it. Then communicate it clearly to your employees, your emergency contact and your clients.

If you want to hear more on this topic, I am excited to be hosting a session at the upcoming IGNITE 2026 Conference in Montreal this September. I hope to see you there! 🌟

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— **Marie-Andrée Giroux, President,**  
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# Helping Clients Come Clean

## A Guide to CRA's Voluntary Disclosures Program

By David J. Rotfleisch, CPA, CA, JD

Clients are often unaware of errors or omissions in their tax filings until their bookkeeper or accountant uncovers them. Unreported income, unfiled returns or incomplete records can expose clients to penalties, interest and allegations of gross negligence. Because accounting and bookkeeping records often reveal issues before tax filings do, practitioners are frequently the first to identify non-compliance.

The CRA's Voluntary Disclosures Program (VDP)

allows taxpayers to correct past errors before enforcement action begins. When accepted by the CRA, the program can provide relief from penalties and, in some cases, interest. The rules, however, are technical and timing is critical.

### Common Situations Where the VDP May Apply

The program may apply to unfiled income tax, corporate, payroll



David J. Rotfleisch

or GST/HST returns; unreported income such as rental, self-employment, crypto or foreign income; overstated expenses; and failures to report off-shore assets. Warning signs often include

unexplained deposits, missing documentation or discrepancies between records and filed returns.

### Conditions for Acceptance Under the VDP

To qualify, a disclosure must be voluntary, complete, involve potential penalties or interest and include payment or acceptable payment arrangements. Partial disclosures are commonly rejected.

### CRA Focus on Prompted and Not-Prompted Disclosures

As of Oct. 1, 2025, CRA policy places greater emphasis on whether a disclosure is prompted or not prompted. Prompted disclosures arise after CRA contact or awareness of enforcement activity and offer limited relief. Not-prompted disclosures, made before CRA contact, provide the greatest opportunity for penalty and interest relief. Early action is therefore essential.



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**Unreported income,  
unfiled returns or  
incomplete records can  
expose clients to penalties,  
interest and allegations of  
gross negligence.**

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**Role of Bookkeepers and Accountants**

Practitioners should document issues, advise clients promptly, recommend consultation with an experienced Canadian tax lawyer and avoid direct communication with the CRA regarding voluntary disclosures.

**When to Recommend a Canadian Tax Lawyer**

Given the legal and procedural complexity of the VDP, professional legal advice is essential.

**Pro Tax Tips**

- ✓ Watch for recurring red flags.
- ✓ Educate clients about early correction.
- ✓ Stress the importance of timing.
- ✓ Refer disclosure matters promptly.

*David J. Rotfleisch is the founding tax lawyer of Rotfleisch & Samulovitch P.C., a Toronto-based boutique tax law and corporate law firm that operates Taxpage.com, a website with vast tax articles and videos. He appears regularly in print, radio and TV. With over 40 years of experience as both a tax lawyer and a Chartered Professional Accountant, he has helped startup businesses, resident and non-resident business owners and corporations with their tax planning, will and estate planning, voluntary disclosures and tax dispute resolution, including tax audit representation and tax litigation. Most recently, he has launched CryptoTaxLawyer.com to help cryptocurrency traders proactively deal with their tax obligations to the CRA and help victims of cryptocurrency scams and schemes deal with their losses. 🌈*



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# Why People Thrive

## Turning Learning into Lasting Impact

By Johanna Van Bilsen

In bookkeeping and financial firms, growth in clients and revenue is often the primary measure of success. Yet as firms expand, a more important question emerges: Are your people growing at the same pace as the business? When this gap appears, it shows up as inconsistency, burnout, turnover and leaders spend more time solving people issues than driving performance. Firms that invest in development build focused, capable and confident teams.

Start with clear, realistic job descriptions that establish a strong foundation for each role. In many boutique firms, employees and leaders wear multiple hats. One day they support client needs, the next they manage day-to-day tasks and deliverables, co-ordinate workflows, refine processes or step into office management and support executive priorities. This leads to confusion and inconsistent expectations. Strong job design focuses on core responsibilities while acknowledging role breadth, helping employees understand where to invest time and energy.

From there, organizations can define what success looks like at different stages of development. While roles may appear linear, expectations shift over time. Entry-level roles focus on accuracy, consistency and process adherence. As employees progress, they must anticipate issues, communicate proactively and contribute to broader outcomes. At senior levels, success is defined by guiding others, balancing competing priorities and developing team capability. It is crucial that expectations and the corresponding skills are clearly articulated for development to become more focused and effective.

Help employees understand what they do well and identify one or two key areas for meaningful improvement. By assessing skill gap themes across the organization, leaders can invest in the right development, at the right time, for the right people. Group training can be paired with practical tools and assessments to strengthen self-awareness, helping individuals understand how they work and how they are experienced by others. Learning must be tailored to real experiences and tribulations such as month-end pressure or client conversations.

A foundational layer of mandatory training is required to support a safe, healthy and respectful workplace. Requirements vary by province, industry and organization size. Investing in on-demand learning ensures firms meet legal obligations while keeping this training affordable, practical and accessible.



Johanna Van Bilsen

Leaders play a critical role in enabling people to thrive, but too often they are promoted based on seniority and technical expertise, not necessarily because of their ability to lead. Motivated leaders can gain the skills to manage performance, have candid conversations about expectations, offer stretch assignments and recognize great work in a meaningful way. For leadership development, one-to-one coaching creates more targeted and timely support. During coaching, leaders can explore solutions to daily leadership challenges, building their confidence and consistency. Feedback surveys add insight into gaps between self-perception and impact on others.

To sustain momentum, learning must remain accessible in the flow of work. On-demand and just-in-time resources allow employees to revisit concepts when needed, reinforcing learning from training, coaching and feedback conversations. This keeps development active and relevant in a fast-paced environment.

Helping people thrive means building confidence and capability through clarity, focus, ongoing learning and consistent leadership. When done well, organizations do not just grow people, they build stronger, more resilient workplaces where people thrive.

*Johanna Van Bilsen is the training practice lead at MaxPeople, where she designs and delivers tailored learning solutions to help leaders and teams build the skills needed to thrive in today's workplace. If you are ready to strengthen your culture of learning and development to build the skills your people need to thrive, visit [maxpeoplehr.com](https://maxpeoplehr.com).* 🌟

# Purpose Isn't A Marketing Strategy

## Building an Impact Organization That Endures

By Matthew Wong, CPA, CGA

I left my job in 2018 with no detailed plan, only a clear sense that something needed to change. I was tired, burnt out and increasingly disconnected from the way I was working. At the time, I was at Native Shoes, a company that genuinely lived its values and played an important role in shaping how I understood purpose-driven business. Native Shoes was doing meaningful work, and I am grateful for what I learned there, but I had reached the end of that chapter and knew I could not continue in the same way.

Before Native Shoes, I worked at Terra Breads, a local Vancouver bakery that lived and breathed impact long before “impact organization” became a formal label. Their values showed up in everyday decisions about people, quality and community rather than through formal frameworks or certifications. Impact was not something they talked about often. It was simply how the business operated.

After leaving Native Shoes and before starting my own firm, I entered a period of uncertainty that many professionals will recognize. I think of it now as an entrepreneurial spirit journey, marked less by clarity and more by questions. During that time, I read extensively about companies attempting, imperfectly, to integrate purpose and profit. I was drawn to stories about organizations like Whole Foods, KIND Bars, IKEA and Starbucks. What interested me was not their scale or branding, but how purpose showed up when decisions became complicated, costly or uncomfortable.

That period of reflection helped crystallize something important. If I was going to build something of my own, it needed to align with how I wanted

to live, not just how I wanted to work.

In 2019, I started Purpose CPA, offering bookkeeping, CFO and accounting and tax services. At the outset, I made a simple commitment to myself: if I was going to do this, it would make a difference in the world beyond profit, no matter how small that difference might be. Since then, the firm has grown to include a values-aligned business partner and a team of 10 staff. What has remained constant is the role purpose plays in how we make decisions.

Many bookkeepers and accountants will recognize parts of this story. Burnout, misalignment and quiet dissatisfaction often appear long before we act on them. It is worth asking yourself directly where you are currently compromising and what it has been costing you.

That conviction was later reinforced when I read *The Purpose Revolution* by John Izzo and Jeff Vanderwielen. One line, in particular, stayed with me: “Purpose is not a marketing strategy.”

At the time, that idea felt clarifying rather than aspirational. Purpose, and by extension impact, was never something I wanted to use to attract clients, justify pricing or differentiate a brand. It needed to exist independently of recognition, growth or





reward. If purpose only mattered when it was profitable or visible, then it was too fragile on which to build anything meaningful.

As the firm took shape, that belief became more practical. I began to realize that purpose had to stand on its own for a future where I might no longer be the primary guardian of the firm's mission and values. One day, staff would need guidance that did not depend on my presence. Leadership, too, would need to be accountable to something more durable than individual conviction.

This raises a direct question for firm owners and sole practitioners alike. If you stepped away tomorrow, what would still guide the decisions made in your practice?

Purpose-driven language is easy to adopt, particularly in professional services. Purpose-driven decision-making is much harder. If purpose only exists because a founder is present to enforce it, then it does not endure.

Impact organizations are built when purpose is embedded deeply enough that it continues to influence decisions even when it is inconvenient or uncomfortable.

For us, that meant moving purpose out of branding and into structure. One of the earliest decisions we made was to embed purpose directly into our articles of incorporation. We adopted a B Corp-style legal framework that required the company to consider all stakeholders, not only shareholders or financial outcomes. This was done before benefit corporations formally existed in British Columbia, which meant there was no ready-made structure to follow. We implemented the framework anyway, not because it was required, but because we wanted purpose to be enforceable rather than aspirational.



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Culture can shift quickly under pressure. Governance does not. By expanding fiduciary responsibility, purpose became a structural requirement rather than a personal preference. Decisions were no longer evaluated solely on financial performance, but by their impact on staff, clients and the broader community. Just as importantly, this framework created accountability for leadership itself.

As professionals, we regularly help clients think through governance, controls and accountability. It is worth asking whether the same level

of intentionality exists in your own practice or whether values are still being carried out informally and personally.

Early in our journey, we took a strong interest in the B Corp movement. What appealed to us was not the certification itself, but the discipline behind it. The B Impact Assessment provided a practical way to understand impact as a series of operational choices rather than abstract ideals. It helped establish a baseline and clarified where changes would make the most meaningful difference.

It also forced us to confront trade-offs. The assessment rewards decisions such as banking with local credit unions as a way to support community investment. While we understood the rationale, we ultimately chose a national bank for personal and operational reasons. That decision did not negate our commitment to impact, but it did require us to be honest about where we were prioritizing differently.



## We wanted purpose to be enforceable rather than aspirational.



This kind of trade-off will be familiar to many bookkeepers and accountants. The question is not whether compromises will exist, but whether they are made consciously and revisited over time.

As we spent more time operating the firm, it became clear that certification mattered less than accountability and follow-through. We elected not to pursue B Corp certification, not because it lacks value, but because we chose to spend our time and resources on making impact rather than proving it. There is no universal right or wrong answer. What mattered was whether our behaviour actually changed. That distinction is often worth raising with clients as well. Labels are visible. Systems and habits are what endure.

Nowhere did the tension between values and constraints become more real than in our approach to fair compensation.



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From 2021 to 2024, we were a proud Certified Living Wage Employer. Living-wage frameworks grounded compensation decisions in reality and shifted conversations away from market minimums toward what it costs to live with dignity. During that period, certification provided both structure and accountability.

In 2025, we made the difficult decision not to renew that certification. The challenge was not a lack of belief in the living wage, but financial sustainability, particularly when employing students. We remained committed to providing meaningful employment opportunities, even when the economics of full certification became difficult to sustain.

Many firm owners will recognize this tension. Supporting people well while maintaining viability is rarely simple. The presence of constraint does not erase values but it does require honest recalibration.

Importantly, the framework did not disappear. We continue to track compensation against living-wage data and ensure pay keeps pace with cost-of-living increases. Impact work often involves holding competing commitments at the same time.

Alongside compensation, we invested early in staff well-being. Rather than waiting for scale or profitability milestones, we implemented a health spending allowance to provide flexible, tax-efficient health support. It was a practical way to support staff while remaining operationally sustainable and reinforced the idea that well-being was a present responsibility.

Giving also became a system rather than an afterthought. We committed to donating 1.1 per cent of revenues annually to non-profits and community organizations. A significant portion is directed to Kiva.org, where microfinance loans are repaid and reissued, creating an ongoing pool of impact over time. Staff participate in selecting recipients, making generosity a shared organizational practice.

Beyond our internal operations, we extend impact through education. We regularly engage with local business groups and provide presentations on accounting and tax topics for small businesses. Improving financial literacy is one of the highest leverage contributions accounting professionals



can make to their communities, even when it is not directly billable.

Building this firm has clarified something I did not fully understand at the beginning. Impact is less about labels, certifications or governance structures, and more about how an organization lives and breathes its values every day. Frameworks matter, but they are only as meaningful as the decisions they inform.

Like revenues and operations, impact ebbs and flows. Some years bring meaningful progress. Other years are defined by constraint or recalibration. That does not mean impact has been abandoned. It means the organization is responding to reality.

What matters most is not getting everything right or doing everything at once. It is starting somewhere and continuing to move forward with intention.

For bookkeepers and professional service firms, impact often looks quiet. It shows up in stronger businesses, more resilient teams and decisions that prioritize long-term stability over short-term gain.

The question for each of us, then, is not whether we will make an impact, but where, when and how intentionally we choose to make it.

*Matthew Wong, CPA, is the co-founder of Purpose CPA, a Vancouver-based accounting firm providing bookkeeping, advisory and accounting and tax services to Canadian businesses. He is passionate about building sustainable, values-driven organizations and advancing financial literacy within the business community. 🌟*

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### Three Things Worth Tracking

When I sit down with a client to go over their referral strategy, I break it down into three main layers. I've also found that people typically only pay attention to one or two layers up to that point.

First, we talk about the referral source. Who is sending people your way? Is it mostly one or two loyal people who carry the bulk of that responsibility? Are there partner types (accountants, web designers, consultants, etc.) who show up more than once in those groups?

Once you know your sources, you can stop guessing where to put your energy. This also helps you invest in the right relationships and see any potential for partnerships that overlap.

The second thing we get into is referral quality. Are the people getting referred to you a legitimately good match for what you do? Or are they missing the mark? If you're getting a high volume of referrals but those conversations fizzle out or drop off the face of the Earth after a week, the issue isn't really the source. It's that your referral partners don't have a clear picture of what you actually do and whom you help. They mean well, but that lack of precision creates volume while eating up quality. Fix your messaging and you'll be on your way to fixing that problem.

Last, we talk about referral outcome. How many of those solid-match prospects become clients? What results do they get from working with you? If you've



got decent referral volume and quality but can't close the deal or the engagements aren't going as well as you'd hoped, it points to a few different things.

Maybe your sales process needs work, or maybe you need to develop a better way to onboard clients, or to qualify them or to set expectations. It could be that the services you're offering need refinement. Maybe you're not delivering the value that you thought you were, or maybe the market has shifted and what you're offering is no longer as relevant or as needed. There are so many areas you can look at to understand why you're experiencing the outcomes that you are.

This is also the layer most commonly skipped. And it's also where things compound the fastest.

### When a Good Referral Doesn't Convert

This one always stings a bit when it happens, and while it's uncomfortable, it's incredibly useful.

When someone comes to you through a warm referral and still doesn't convert into a client, it's very rarely a question of quality. Warm leads have a certain amount of built-in trust, so you need to look elsewhere for the problem.

If they don't convert, it's almost always about perceived value and risk. Chances are that they're not confident your offer is the right solution to their problem. Or maybe the investment doesn't seem to match the outcome that you've promised. And while this isn't fun to hear, it does present an incredible opportunity.

You don't need to worry about finding better referrals. You just need to get clearer about communicating the value you offer right from that first conversation. Leave no doubt in their mind that working with you is worth it.

### Wins Are Fuel

Each time you deliver incredible results for a referred client, your referral partners get to feel like



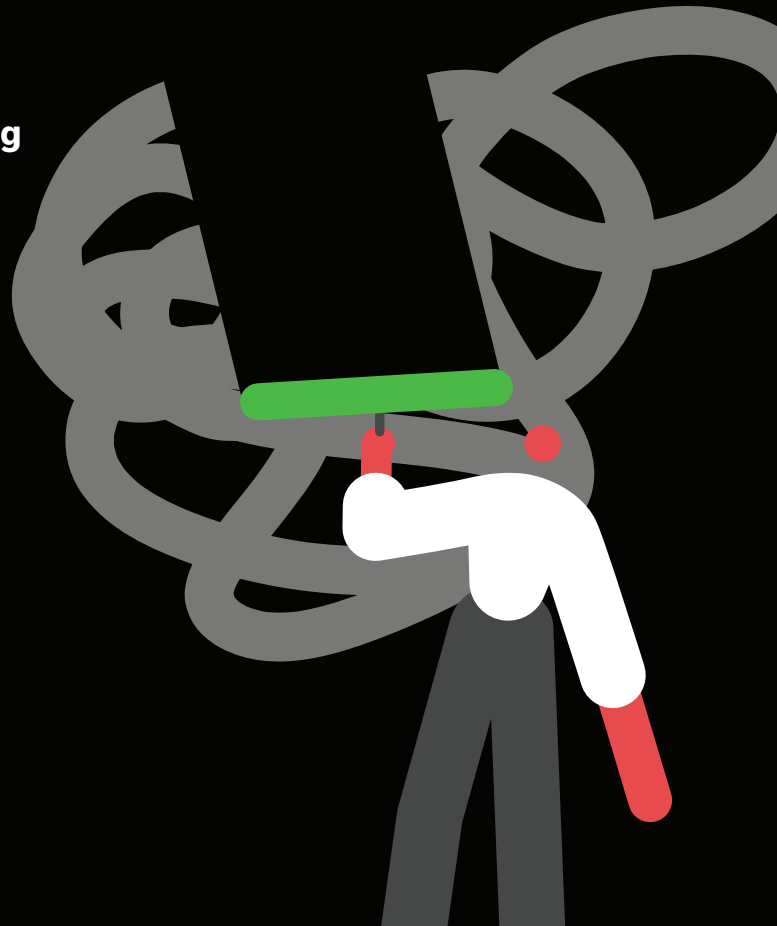
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heroes. They begin to send more people your way because they know what a phenomenal outcome looks like. They've heard about it from the people you've worked with who've thanked them for setting up that connection. From there, it grows and grows.

It's precisely why tracking outcomes matters so much. Case studies aren't just some sort of marketing material we use. They're a genuine feedback loop that makes your whole referral network stronger. When you can tell a partner the amazing things that happened for the last person they referred to you, you're giving them a story that they can share. You make it easy for them to represent you in the best possible way.

And those stories? Those are the ones that make colder marketing efforts worthwhile down the line. You're not asking a stranger to trust you "just because." You're showing that stranger exactly what's already happened for people just like them.

### **Building a System that Works**

The good news is that you don't need some painfully expensive software to achieve any of this. It all starts with a simple habit. Write things down. Where did that lead come from? Were they a good fit? Did they convert to a client? What results did we achieve for them?

Tracking those four data points consistently will tell you far more about your business than just about anything else you measure regularly. You can see which



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partner-types send referrals that are the best fit, which conversations convert and which ones fizzle out and what your ideal clients actually look like, not just what you think they look like.

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## **Your best clients didn't find you by accident.**

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As soon as you spot the patterns of what's working, the next step is simple. Find more people like that. If one accountant sent you three amazing clients you love working with, find two more who serve the same type of business. That data will show you a clear path you can follow without feeling like just another shot in the dark.

### **Your Warmest Network is Already Rooting for You**

The people you've built some kind of relationship with — past clients, partners, colleagues who've seen you in action or know your work — are already your biggest and best advocates. The only question left is if you've made it easy for them to champion you and do it well.

Build the system. Track the layers. Share the wins with your partners when things go well.

Your best clients didn't find you by accident. And the next ones don't have to, either.

*Jordan Labelle is an expert in building sustainable service businesses and the founder of Evergreen Growth Collective ([www.evergreengrowthcollective.com/](http://www.evergreengrowthcollective.com/)), working with established service business owners to create consistency, scalability and work-life balance through proven systems. 🌱*



# From Bookkeeper to Advisor: Turning Your Clients' Payroll Data Into Strategic Insight

Your clients already trust you with their numbers. But they're not paying you just for the numbers — they're paying for what the numbers mean. This is the shift from reporting to understanding, where workforce data becomes something you don't just deliver, but interpret.

Right now, most of the answers your clients need — about staffing costs, turnover and how to plan ahead with confidence — are already sitting inside their payroll data. The most valuable bookkeepers are the ones who surface those answers.

With Payworks Workforce Analytics available alongside Payroll or built directly into HR, Time and Absence Management at no additional cost, you can do exactly that without adding more tools, work or complexity.

Bringing together payroll, HR and absence data into one intuitive platform gives bookkeepers a powerful way to deepen client relationships and grow their practice. Because insight is built right in, there's no exporting, reconciling or second-guessing your numbers — just clear, connected data you can use right away.

Here are four ways Workforce Analytics can help you add more value to every client conversation and become the strategic advisor your clients didn't know they needed.

## 1. Help Clients Control Staffing Costs

Most clients don't realize how much their staffing decisions are costing them until you show them. You're already in the details of their payroll data. Analytics lets you surface what that data is actually saying.

Take overtime, for example. With Workforce Analytics, you can quickly compare overtime hours between pay periods or year-over-year. If a client's business consistently spikes in overtime during certain months, you can present them with a data-backed comparison: is it more cost-effective to pay the overtime or bring on temporary staff during peak periods? That kind of strategic guidance — grounded in their own data — is something they simply can't get from their books alone.

Instead of just reporting on labour costs, you can help clients understand what's driving them and where to adjust.

## 2. Spot Sick Time and Turnover Trends Before They Become Problems

When a client is constantly scrambling to cover shifts, they're often too deep in the problem to see what's causing it. Analytics gives you the view from above.

By examining payroll data alongside absence and HR data, you can identify sick time trends by frequency, timing and department and flag turnover patterns by occupation and demographic. Complex workforce stories often hide in plain sight within the details. Bringing those patterns to your client's attention puts them back in control and positions you as the advisor who spotted the issue before it became a crisis.

The patterns are already there — analytics simply helps you surface them sooner and speak to them with confidence.

### 3. Help Clients Stay Competitive as Employers

Is your client struggling to hold onto good people? Before concluding it's a market problem, it's worth looking at the data. This is where your role starts to shift from answering questions to helping clients ask better ones.

Workforce Analytics lets you build a clear year-over-year picture of total compensation, including benefits value, vacation costs, expenses and allowances, and benchmark that against industry norms. HR analytics adds another layer, providing workforce culture insights through cross-sections of age, gender diversity, length of service by occupation, department and more.

This kind of demographic intelligence can also drive smarter benefits strategies. By combining benefits usage data with year-over-year premium costs and shifting staff demographics, you can help your clients prioritize what actually matters to their team and make the case for it with numbers, not guesswork.

You're not just tracking compensation — you're helping them compete for talent.

### 4. Measure Whether Training Investments Are Paying Off

Your client has invested significantly in a new training program, but is it working? Workforce Analytics can help answer that question with real data.

The platform can illuminate the total time and dollar investment of staff training, which can then be cross-referenced with product sales, safety records or productivity metrics to determine whether the program is delivering a positive return. That training spend can also be presented as part of a total compensation picture — a compelling tool for recruitment and retention narratives, and in some provinces a legislative reporting requirement.

You can give them proof of what's actually working.

### Already Built In. No Add-Ons, No Extras

When insight comes built in, adding value doesn't mean adding more work — it means making more of the work you're already doing.

The platform features pre-built visual dashboards with flexible filters, easy data export and a common database across their suite of solutions, meaning zero data re-entry and a single source of truth for every client.

For bookkeepers managing multiple client accounts, Payworks also offers single-login access across all clients, seamless integrations with popular accounting software and dedicated support from Canadian payroll professionals.

*"Here at eGO Bookkeeping, Payworks is our preferred payroll software. In our opinion, they have the most streamlined implementation process and highest level of customer support. No need to 'start a chat' or 'submit a ticket' with these guys. Simply pick up the phone and talk to a Canadian payroll expert."*

- eGO Bookkeeping  
Kingston, ON

Once you start bringing these insights forward, you're not just managing your clients' numbers — you're helping shape the decisions that move their business forward.

### Let Us Show You How We're Different

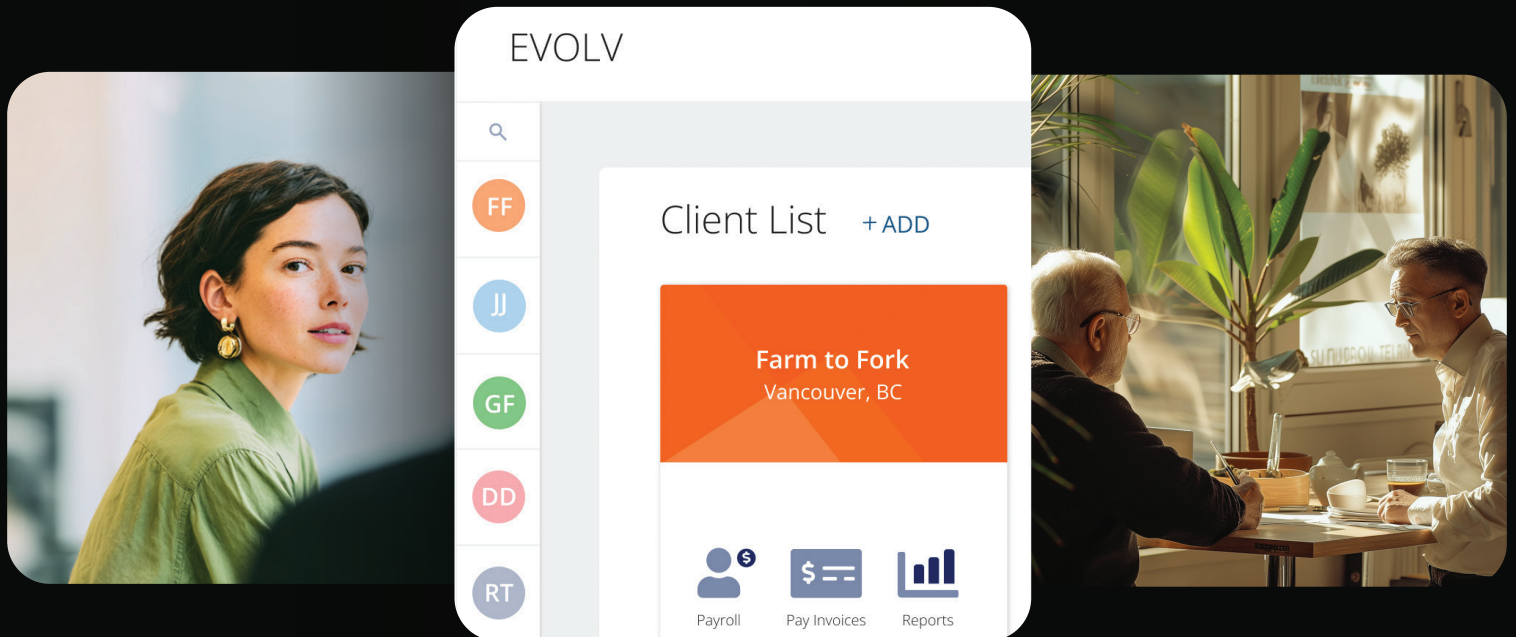
Not all payroll platforms are built by and for Canadians. Payworks is. Founded in Winnipeg in 2001 by a woman entrepreneur who saw a gap in how Canadian businesses were being served, Payworks was built to deliver reliable payroll, deep compliance expertise and the kind of service professionals can truly depend on. Because we continuously improve our platform, clients are always on the latest version with no disruptive migrations or re-implementation headaches. Combined with locations and NPI-trained teams across all time zones and a track record of smooth, dependable year-ends and T4 seasons, you get support you can count on when it matters most. For bookkeepers, that means fewer surprises, more confidence and a partner that helps you deliver your best work every time.



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**Facilitator:** Daria Malin, CEO & Lead Strategist, Boost Strategic Coaching

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### From Automation to Advisory: Using Financial Analysis to Validate and Explain AI-Supported Insights

Kerry Smithies, CPA, CA

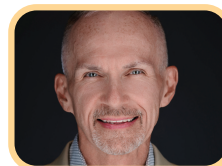
Turn AI-powered outputs into meaningful advisory conversations. Learn how financial analysis supports smarter decisions — and how to explain AI-supported insights clearly and confidently to clients.



### Payroll at a Crossroads: What Bookkeepers Need to Know Now

Steven Van Alstine, PLP, CAE

Payroll is evolving quickly. This timely session explores today's most pressing payroll considerations and what bookkeepers need to understand to stay compliant, informed and ahead.



### Pricing That Actually Works (And How to Fix It When It Doesn't)

Andrew Seguin, CPB

If your pricing no longer reflects your value, this session is for you. Learn practical strategies to build pricing models that support growth — and how to course-correct when pricing isn't working.



### From Technician to Business Builder: The Real Shift Towards Growth and Scale

Robert Gauvreau, FCPA, FCA, LPA

Making the leap from practitioner to business builder requires a mindset shift. This session explores what truly drives sustainable growth and how firm leaders can create scale without burning out.



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## Unlocking Opportunities

### Five Strategies to Attract Younger People to Bookkeeping

By Arielle Smith, CPB

In the world of finance, bookkeeping often goes unnoticed, despite being a rewarding profession. Attracting younger individuals to this field requires a focused effort to raise awareness, clarify career paths, highlight opportunities, emphasize flexibility and engage with relevant communities. Here are five strategies to achieve this goal:

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Your Way – Read, Watch,  
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- **Strategy Suite** – Growth, pricing, advisory and firm leadership
- **People First** – Leadership, communication, culture and client relationships

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"IGNITE 2025 was packed with amazing keynotes and presenters sharing a wealth of knowledge. The mix of quality education and social events makes this a must-do conference every year."

— Retta McLeod, CPB



"There is no better software-agnostic gathering of Canadian bookkeepers that I am aware of. Definitely worth expanding your network!"

— Jonathan Carter,  
CPA, CMA, CPB



"The quality and depth of the conversations and connections surpassed my expectations. What a wonderful and genuine community!"

— Kerry Smithies, CPA



"IGNITE 2025 was a fantastic conference experience! I will be taking everything I learned back to our practice. Can't wait for next year!"

— Vanessa Arreaga, CPB

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 Founder of All Tasks  
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### Mentor of the Year Award



Laura Acs, CPB  
 Founder of Collective  
 Finance

### Emerging Leader of the Year Award



Emily Bettle  
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 Bookkeeping

### Professional Leader of the Year Award



Nick Davis, CPB  
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 Solutions Inc.

### Professional Leader of the Year Award



Arielle Smith, CPB  
 Co-Founder of Fix My  
 Books

### Industry Excellence Award



Marilyn Benninger  
 In Memoriam

### Organizational Excellence Award



Karve Solutions Owners  
 Christina Carlos, CPB &  
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# Sage



# ACCOUNTING AUTOMATION: A PRACTICAL SOLUTION FOR BUSY TAX SEASON



For accountants and bookkeepers, tax season concentrates complex work into a short period. Firms must process large volumes of financial documents, maintain accurate records, and move each client file through review and compliance workflows—all while managing day-to-day operations.

In Canada, busy season typically runs from January through April. T4 filings begin in January, individual tax returns are due April 30, and self-employed filers face a June 15 deadline—even though most preparation happens earlier in the spring.

During this period, capacity is tight, accuracy is non-negotiable, and manual processes become detrimental. Manual data entry wastes valuable time on low-value tasks. Receipts, invoices, and bank statements must be keyed, checked, and posted before reconciliation, reporting, and filing can begin.

Documents often arrive through multiple channels—email attachments, client portals, mobile uploads, or paper drop-offs—creating scattered intake processes that slow workflows and make it difficult to maintain consistency across clients. Add late submissions, last-minute questions, and an influx of client communications, and it's easy to see why busy season places so much pressure on accounting teams.

Automation offers a practical way to manage these challenges. By centralizing document intake and reducing manual data entry, automation tools help firms process financial data faster and create repeatable steps that hold up when volume rises.

## Why automation matters for accounting firms

Automation is now integral to modern accounting workflows. By replacing repetitive tasks with intelligent technology, firms gain efficiency and free up resources for higher-value initiatives like marketing, practice management, or skills development.

## Some of the key benefits include:



**Time savings** for higher-value work



**Reduced risk** of human error



**Faster access** to financial insights



**Improved compliance** and audit readiness



**Scalable operations**

During the busiest periods, these advantages become especially valuable.

## What accounting automation tools do

Accounting automation tools reduce manual work across core processes. They capture financial data, organize documents, and apply consistent rules to transactions, allowing firms to process higher volumes without sacrificing accuracy.

## Common tools include:

- Data capture automation for receipts, invoices, and bank statements
- Bank feeds and reconciliation tools
- Accounts payable and receivable automation
- Document management systems
- Client portals for secure submissions
- Practice management software
- AI-driven categorization tools

Together, these technologies create structured, repeatable processes with fewer errors, faster turnarounds, and more time for advisory work.

### **Automating data entry during busy season**

Manual data entry remains one of the most time-consuming tasks. Every receipt, invoice, and statement traditionally needs to be reviewed and entered line by line. During tax season, processing hundreds—or thousands—of documents can take countless hours.

Solutions like AutoEntry by Sage capture financial data from source documents and publish it directly into accounting systems. OCR technology extracts key information from receipts, invoices, and statements, while built-in validation checks help ensure accuracy before posting.

These tools support multiple intake methods, allowing documents to be submitted through mobile apps, email forwarding, or direct uploads. By standardizing collection and processing, firms can reduce errors, eliminate redundant workflows, and speed bookkeeping during busy season.

### **Creating scalable bookkeeping workflows**

Automation also supports scalable operations. Batch posting, categorization rules, and integrated workflows reduce time spent on manual entries and allow firms to scale without adding headcount.

Rather than chasing paperwork or sorting stacks of files, accounting teams can rely on centralized dashboards that automatically organize incoming documents. Tools like AutoEntry by Sage collect receipts, invoices, and statements in one place and prepare them for posting. Documents are stored securely, timestamped, and searchable—simplifying retrieval for reporting or compliance.

This structured approach improves efficiency during busy season and supports stronger record-keeping year-round.

### **Moving from manual work to strategic advisory**

With the efficiency gained from automation, accountants spend less time on administrative tasks and more on high-value work like interpreting financial data and providing strategic insights.

#### **Firms can dedicate more time to:**

- Analyzing financial trends
- Identifying tax planning opportunities
- Helping businesses improve cash flow
- Providing forward-looking guidance



**I just upload bank statements through AutoEntry and import them into Sage. It's painless and seamless."**

**Sara Gibb**

Flow Works Bookkeeping & Consulting

As technology handles transactional tasks, accountants increasingly act as strategic advisors. Automation ensures data is captured quickly, accurately, and consistently, supporting this shift.

### **A smoother path through tax season**

Busy season brings pressure, deadlines, and high volumes of documents. But firms can manage it differently.

By automating document intake, data capture, and bookkeeping, teams replace time-consuming manual processes with structured, repeatable workflows. Solutions like AutoEntry by Sage streamline document processing, reduce administrative work, and maintain accuracy across large amounts of data.

For accounting professionals navigating the busiest months, automation offers a clear advantage: less time on repetitive tasks and more time delivering insights and value to clients.



**Get Started with AutoEntry**



# From Ledger to Leverage

## How Accountants and Bookkeepers Can Persuade with Confidence

By Michael Lewis

Effective communication builds and sustains business relationships, but persuasion is one of the most valuable skills any accounting professional can develop and use. The ability to influence your clients' decisions and choices when needed, ethically and effectively, shapes outcomes, strengthens relationships and supports long-term success. Leaders rely on persuasion to motivate teams, professionals use it to advocate for ideas and advisors depend on it to guide others toward sound decisions. Persuasion is not about manipulation or pressure. It is about understanding people, building trust and guiding

conversations toward outcomes that benefit everyone involved.

The most effective persuaders blend credibility, logic, emotional intelligence and preparation. Rather than forcing agreement, they create conditions in which others are willing and motivated to say yes.

### **Trust, Logic and Emotion are the Foundation**

Every successful persuasive interaction truly rests on three pillars: trust, logical reasoning and emotional connection.

Trust is the starting point. Your clients are far more open to influence

when they believe you are honest, authentic and acting with integrity. Trust develops when others sense genuine concern rather than self-interest. Without it, even the strongest arguments are likely to be met with resistance.

Logic gives persuasion its structure. Your proposal must make sense to the client. Clear thinking, sound reasoning and a well-articulated rationale allow clients to follow your perspective and understand the practical value of your ideas. Logical clarity reassures them that your recommendations are grounded in reality rather than impulse.

Emotion provides the final and often decisive element. People rarely make decisions based on logic alone. Emotions such as security, pride, belonging and hope strongly influence perception and choice. Effective persuaders recognize this and frame their ideas in ways that connect with what people feel, not just what they think. When trust, logic and emotion align, persuasion feels natural rather than forced.

### **Building Rapport Through Adaptability**

Rapport is one of the most underestimated aspects of persuasion. Your clients are more receptive to people who feel familiar and relatable. That should be your goal as their advisor. Also, skilled persuaders adapt their communication style to match their clients.

This adaptability often involves subtle mirroring — adjusting tone, pace and demeanour to align with the other person. A direct, business-focused client responds best to clarity and structure, while a more relaxed person may engage better with a conversational approach. Mirroring is not imitation or insincerity; it is social awareness and respect.

There is an important exception. When or if your client becomes angry, frustrated or emotionally escalated, mirroring their behaviour will only intensify the situation. In these moments, effective persuaders do the opposite. They respond with calmness, steadiness and patience, helping to de-escalate tension and restore productive dialogue.

### **Speaking With Certainty and Confidence**

Certainty and confidence are powerful, persuasive tools. When you genuinely believe in what you are saying, your clients will sense it. Confidence signals competence



and credibility, increasing the likelihood that people will listen and engage.

This confidence must be rooted in understanding rather than arrogance. Professional knowledge, experience and insight form the foundation of persuasive authority. When you understand the numbers, so to speak, from multiple perspectives, you can communicate with clarity and assurance.

Preparation plays a critical role in building confidence. Knowing your work deeply allows you to respond to questions and objections without defensiveness. When your clients sense that you are well prepared and grounded in your convictions, they are more inclined to trust your recommendations.

### **The Power of Calm, Rational Communication**

Persuasion thrives in calm environments, especially when discussions involve high stakes or emotional topics. Speaking to clients rationally and with composure enhances credibility and influence.

Calmness conveys control and control conveys authority. Managing tone, body language and pacing signals professionalism and confidence. Open posture and steady eye contact further reinforce trust.

Remaining calm also has a strategic effect. Emotions are contagious and calm behaviour often invites calmness in return. Anger and

emotional outbursts, by contrast, tend to shut down dialogue and damage relationships. Even when anger appears persuasive in the short term, it often leaves behind resentment that undermines future co-operation. By staying measured in your interactions with your clients, you preserve the possibility of mutual respect and constructive conversation.

### **Persuasion Begins With Preparedness**

Preparation is one of the clearest differences between average communicators and exceptional persuaders. Being prepared ahead of conversations with clients means understanding your argument thoroughly, anticipating their objections and practising how you will express key points.

The principle is simple: it is better to be over-prepared than caught off guard. Effective persuaders strive to be the most informed people in the room. They research the context, understand constraints and anticipate challenges before they arise.

Preparation builds confidence and confidence earns respect. When you respond calmly and competently to objections, you demonstrate seriousness and credibility. Practising your message in advance ensures clarity and reduces the risk of being derailed by unexpected questions or emotional reactions. Your clients expect that level of professionalism from you.



### Keeping It Simple

One of the most common mistakes in persuasion is over-complication. Keeping things simple is especially important when influencing others. Simplicity improves understanding and reduces resistance.

Clear, straightforward ideas are easier to absorb and evaluate. Excessive detail often creates confusion, invites doubt and generates unnecessary objections. Effective persuaders introduce ideas at a high level first and provide detail only as interest and understanding grow.

Simple conditional framing can be especially effective. Statements such as: “If I could show you how this works better, would you be interested?” invite curiosity rather than confrontation. This approach shifts the interaction from persuasion to collaboration, giving the client a sense of choice and control.

### Selling a Vision and Transferring Enthusiasm

Persuasion is not only about facts; it is also about vision. Clients are motivated by possibilities they can imagine. One of the most powerful persuasive skills is helping your clients visualize success.

Persuasion has often been described as the transfer of enthusiasm. When you genuinely believe in your proposal, that belief is conveyed through tone, energy and presence. How you say something can matter as much as what you say.

Skilled persuaders paint vivid pictures with words. They describe outcomes clearly, using examples, demonstrations and stories to make ideas tangible and memorable. The

clearer the vision in your own mind, the easier it becomes for others to see it and feel motivated to support it.

### Focusing on Your Clients’ Needs

Perhaps the most important shift in effective persuasion is moving attention away from yourself and toward your clients’ needs and interests. People naturally prioritize their own concerns and successful persuaders respect this reality.

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**When you respond calmly and competently to objections, you demonstrate seriousness and credibility.**

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Empathy is essential. By genuinely seeking to understand what your clients value and what challenges they face, you build trust and connection. Listening carefully and asking thoughtful questions shows respect and signals that their perspective matters.

Listening also provides practical benefits. You’ll discover by listening that your clients often reveal critical information, priorities, constraints or fears that can help shape a solution

acceptable to everyone involved. When someone feels heard and understood, they become far more open to hearing your ideas in return.

### The Role of Compromise in Persuasion

Persuasion is rarely a zero-sum exercise. Effective outcomes often involve thoughtful compromise. Flexibility, such as adjusting timelines, offering additional information or allowing time for reflection, can significantly increase the likelihood of agreement.

Strategic concessions create a sense of balance and fairness. When you give something, even something small, it often encourages reciprocity. These compromises do not need to be large to be effective; small gestures can build momentum and goodwill. Flexibility signals confidence rather than weakness. It shows that you are focused on outcomes rather than rigid positions and that you respect your clients’ autonomy and needs.

### Persuasion as a Skill

Effective persuasion is not about dominance, pressure or clever tactics. It is a skill rooted in trust, preparation, empathy and integrity — something in common with the accounting profession. By communicating clearly, managing emotions and focusing on shared outcomes, you can influence your clients’ decisions and choices in ethical, respectful and lasting ways.

When practised thoughtfully, persuasion becomes less about winning arguments and more about building alignment, co-operation and positive change for individuals, organizations and society.

*Michael Lewis is the founder and managing director of Michael Lewis Training, Motivation and Development, a London, Ont. training and development firm founded in 1994 with a passion for leadership and workplace solutions. 🌟*



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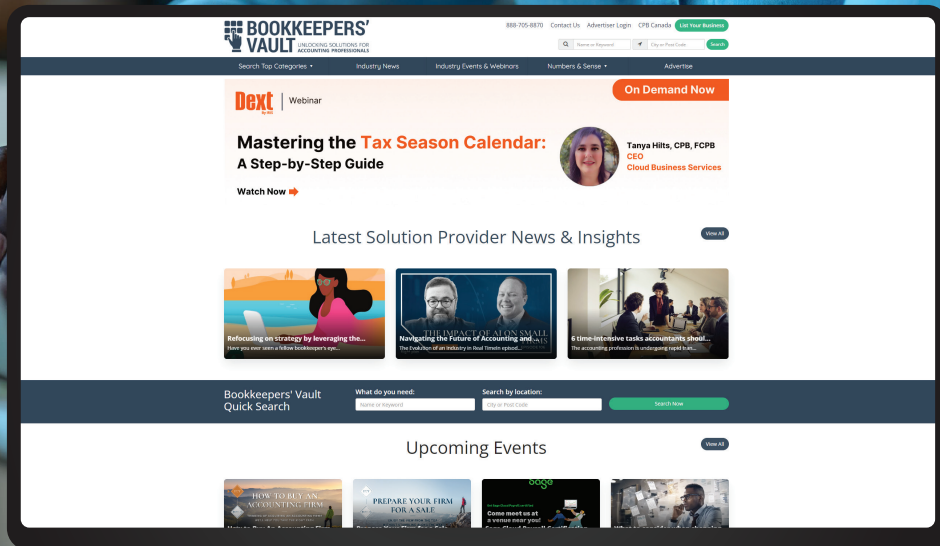
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# Sometimes You Have to Break Things to Grow Your Company

## Here's How to Do It Strategically

By Melisa Gaetani, CPA, CA, PhD, CHRL

Growth is often treated as a simple success metric: more clients, more revenue, more people. But inside a growing firm, it rarely feels that clean. More often, it shows up as pressure: on systems, on leaders and most of all, on people.

That was our reality in 2024. From the outside, the firm looked strong. We had grown to over 40 people, demand was steady and despite the strain, our retention led the industry. Internally, however, the experience was very different. The infrastructure that had supported us so effectively at 20–25 people was no longer sufficient. Workflows were inconsistent, decision-making was becoming reactive and capacity was stretched to its limits. Our team, while still performing at a high level, was operating in a state of sustained fatigue and periodic burnout.

We weren't failing, but we were no longer functioning in a way that

could support continued growth. That distinction matters because many firms reach this point without recognizing it as a critical inflection.

### When Growth Outpaces Design

One of the most overlooked realities in professional services is that growth fundamentally changes the nature of the business. The systems, structures and communication patterns that work at one stage rarely scale cleanly into the next.

What we experienced was not a sudden breakdown, but a gradual erosion. Turnaround times lengthened, leaders became bottlenecks and high performers compensated for gaps in process. Productivity was maintained, but at an unsustainable cost. At that point, firms face a choice: continue operating within a strained model or intentionally redesign it. We chose the latter, but doing so required a shift in mindset.

We had to stop thinking about change as a disruption to manage and start treating it as a capability to build.

### Change Management as a Discipline

Too often, change is approached reactively. It is triggered by pain rather than guided by strategy. What became clear to us is that successful change depends less on the decision itself and more on how effectively it is managed across the organization.

At its core, change management requires clarity in five areas: why the change is necessary; what the future state will look like; how the transition will occur; who is impacted and how they are involved; and what success looks like for both the organization and the individual. Without alignment across these elements, even well-intentioned changes can create confusion, disengagement or resistance.

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For us, the purpose was straightforward. We needed to build a firm capable of sustaining growth without exhausting the people responsible for delivering it. But translating that into a coherent and actionable transformation required deliberate design.

### **Rebuilding for Scale**

The most visible change we made was structural. We reorganized the firm into smaller, accountable pods, each with clearer ownership and more defined workflows. This shift reduced dependency on centralized decision-making and created a more manageable operating environment for both leaders and team members.

However, structure alone does not solve capacity constraints. To address that, we invested in roles that would increase leverage across the organization: a workflow manager, a data analyst, an executive assistant and additional administrative support. We also expanded our offshore professional team, not as a cost-driven decision, but as a strategic response to capacity limitations.

Growth without sufficient capacity is not sustainable; it simply redistributes strain across the system.

### **The Human Side of Change**

The real complexity of change lies in how people experience it. Even when a change is clearly necessary, it introduces uncertainty. People naturally evaluate how it will affect their role, their workload and their sense of stability within the organization. Without sufficient clarity, that uncertainty often manifests as resistance.

One of the most important lessons we learned is that resistance is rarely irrational. It is usually a response to incomplete information or a lack of perceived control. Addressing it requires more than communication. It requires engagement.

We focused on making the change visible and understandable at every stage: explaining not just what was happening, but why it mattered and how it connected to the broader direction of the firm. We created space for feedback and adjusted elements of the plan where necessary. Involving people in the process helped shift the dynamic from something being imposed to something being built collectively.

### **Managing the Transition**

Another critical insight was recognizing that change is not a single event but a progression. People move through stages as they adapt: initial uncertainty, followed by friction or skepticism, and eventually, if managed well, acceptance and commitment.

These stages do not occur uniformly across a team. Effective leadership during change involves recognizing these differences and responding accordingly by providing clarity early, support in the middle and recognition as adoption takes hold.

### **What Drives Buy-In**

While it is important for people to understand the business case, buy-in is ultimately driven by more personal factors. Individuals need to see how the change connects to their own growth, sense of ownership or ability to contribute meaningfully.

We focused on creating opportunities for autonomy, recognizing progress throughout the transition and aligning responsibilities more closely with individual strengths. This did not eliminate the challenges, but it changed how those challenges were experienced.

### **Outcomes and Reflection**

We anticipated disruption during this process, including the possibility of turnover. What we experienced instead was 96 per cent retention.

This outcome was not the result of flawless execution, but of consistent attention to the human side of change. By maintaining transparency, involving the team and addressing concerns early, we were able to navigate a significant transformation without losing the people who made it possible.

### **Lessons for Growing Firms**

Growth fundamentally changes the operating requirements of a firm. Without intentional redesign, existing systems will eventually become constraints.

Organizational structure is strategic. It determines how the work flows, where decisions are made and how effectively teams operate. Capacity cannot be solved through effort alone. It requires design. Resistance is insight. It highlights where clarity or alignment are missing. Most importantly, people do not resist change itself; they resist uncertainty.

### **Breaking as a Strategic Choice**

In retrospect, 2024 was not a year of instability, but of necessary transformation. We reached the limits of our existing model and chose to rebuild rather than continue operating within it.

Growth did not break us, but it did require us to break what was no longer working. For firms navigating similar transitions, the lesson is clear. Sometimes the path forward is not about preserving what has worked, but about having the discipline to redesign it.

*Melisa Gaetani, CPA, CHRL, PhD, works at the intersection of accounting, people strategy and thought leadership at TGC CPA. In a firm redefining the profession with a four-day work week, a bias toward challenging norms and failing (learning) out loud, she brings a thoughtful perspective, drives client excellence and helps build more agile, human-centred ways of working. 🌟*