



WE 

We Love Group

We Love providing outsourced solutions to make running your business easier.

Day 2





Andrew Chilton @notlih911

What normal tasks do you outsource, i.e., preparing your meals, doing your laundry, etc in order to enable you to focus on work? [#AskGaryVee](#)

VOICEOVER BY: @hollymara 

THE

#ASKGARYVEE SHOW



Powered by We Love Group **WE** 

- Over the next two days you are going to be introduced to the many products and services that part of WLG. At the core of this will be:

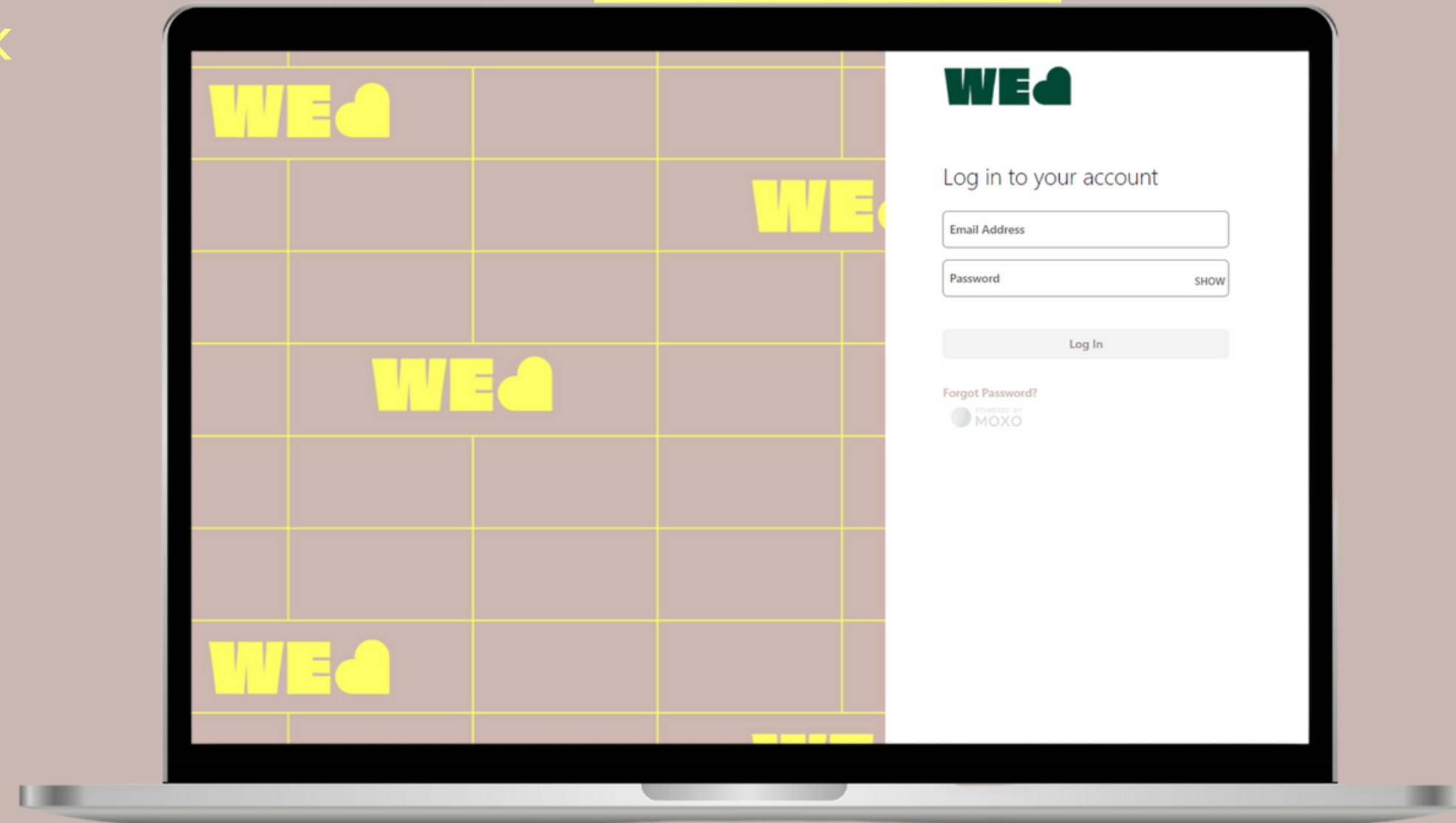
 **Product**  **Process**  **People**

- Technology is at our core. Trust & Accountability are embedded within our ethos.
- WLG was born from insights from LYD members and what Naked Accounting was experiencing. Service, Clients, Pressure, etc.



Powered by We Love Group

- The WLG App is our playground to work with you, it is your playground to succeed
- We want to work with each and every WLG member firm to continue to build out this ecosystem and playground
- We Love Group member firms will be invited into the playground



Powered by We Love Group

- The next two days will provide an overview of the WLG. These will develop out over the coming weeks and months into detailed webinars.
- We will be releasing more and more benefits as part of this for WLG member firms, and LYD member firms including multi service discounts, training, events, and more. Maybe some WLG Swag as well.
- WLG is an important core partner to LYG / LYD / LYTG. Upside for LYG shareholders.



Connecting the Dots – Day 1 Wrap Up

 Marketing  Lending  Valuations  EO

Core Focus + Deliverables

 Partnerships

 Trust

 Transparency

 Accountability

 Client Marketing + Education

Connecting the Dots-Day 2

-  **Bookkeeping**
-  **SMSF Administration & Compliance**
-  **HR + People**
-  **Coaching – Business + Leadership**
-  **Virtual CFO**
-  **Accounting**

WE 

WE LOVE

BOOKKEEPING

**Reliable Bookkeeping
for Successful
Accounting Firms**



WE LOVE BOOKKEEPING

- ♥ Are you wasting money and valuable time with your highly trained accounting staff doing messy, low paid bookkeeping jobs?
- ♥ Do you have ghost bookkeepers that disappear leaving your valued clients stuck with their data entry at BAS time?
- ♥ Do you have endless headaches to find reliable and accurate bookkeepers?



WE LOVE BOOKKEEPING



Our Team: Dedicated to Your Success

With a team of 6 highly experienced CPA/CA accountants, senior bookkeepers and Client Support staff and an unlimited number of experienced and quality verified bookkeepers, we are there to support your team, your growth, your success.



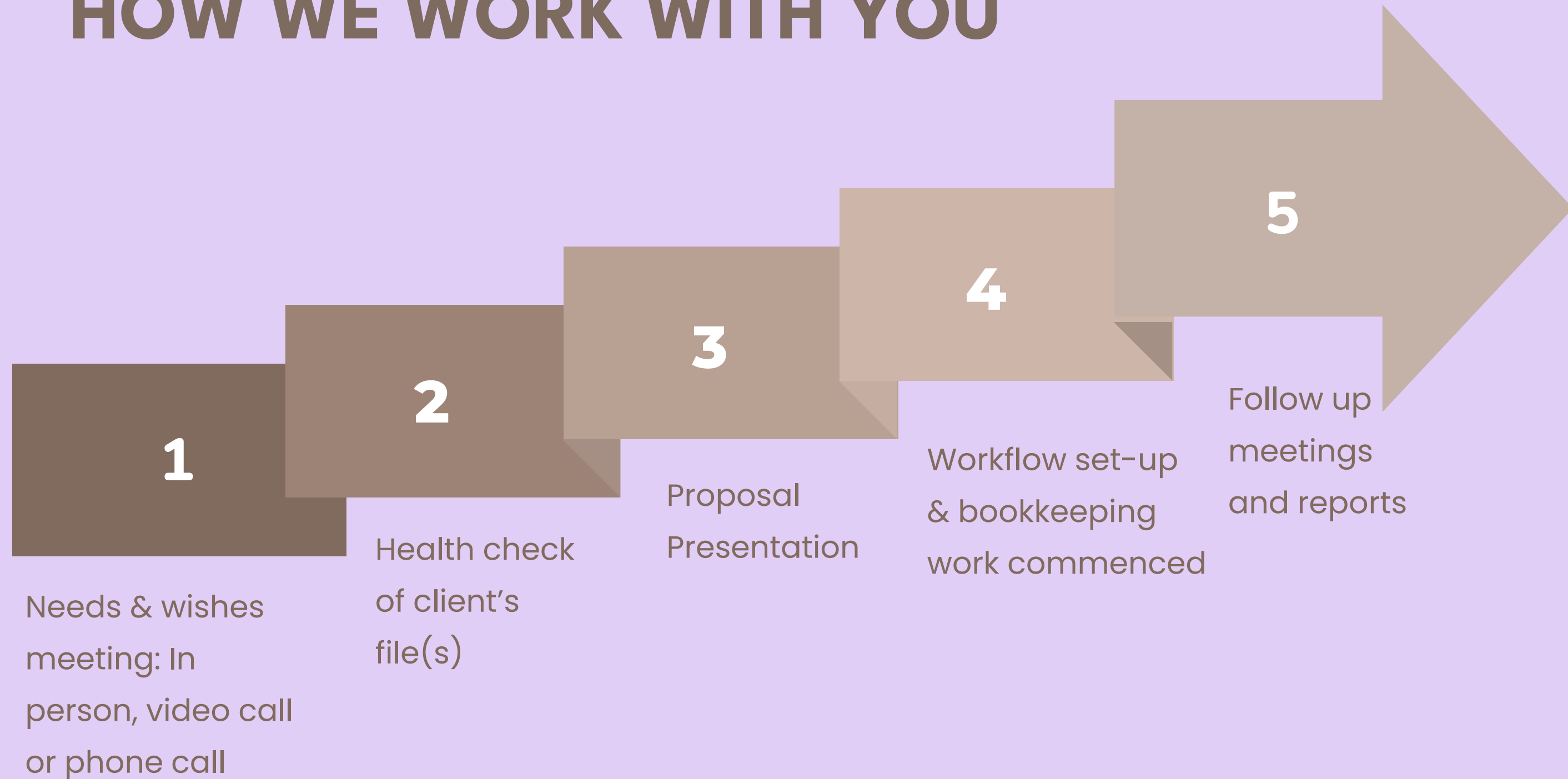
WE LOVE BOOKKEEPING

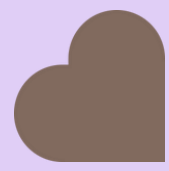
Start this financial year with lightning speed growth...

- ♥ Trusted bookkeeping solution.
- ♥ Focus on 20% of high impact activities that provide 80% of your financial results.
- ♥ Focus on stability, forget stress.



HOW WE WORK WITH YOU





Most popular packages

TLC	TLC Plus	Payroll Only
3 hrs/week	5 hrs/week	up to 5 staff
Bookkeeping + BAS + Payroll + Reporting	Bookkeeping + BAS + Payroll + Reporting	Payroll + Superannuation processing & lodgement
\$227 per week	\$367 per week	\$147 per payroll



WE LOVE BOOKKEEPING



What's a Bookkeeping Health Check?

Report on Xero (QB, Myob.) client file measuring:

- ♥ Data Quality Score: summary value; 70 checks, all financial data
- ♥ Data quality risk value: Tax, fraud, duplication, payroll, unusual txns
- ♥ Contact quality: ABN checks, contact details
- ♥ AP/AR outstanding
- ♥ Bank accounts movements & reconciliation status



WE LOVE BOOKKEEPING

♥ First 10 firms to sign up before 30th September

♥ YOU GET FREE - 5 health checks of your client's companies Xero (QB, MYOB) files, valued each @\$397.

TOTAL VALUE \$1,985




♥ **No set up costs**

♥ **No Lock in contracts**

WE 

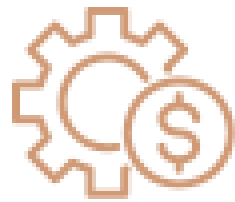
**WE LOVE
SMSF**

Why our clients choose to outsource their SMSF work

-  Difficulties in finding and keeping employees with the required skills in SMSF
-  Not enough client SMSF funds to justify having a dedicated SMSF resource
-  Reluctance to split resources, focus and staff training from core service offerings



WE LOVE SMSF



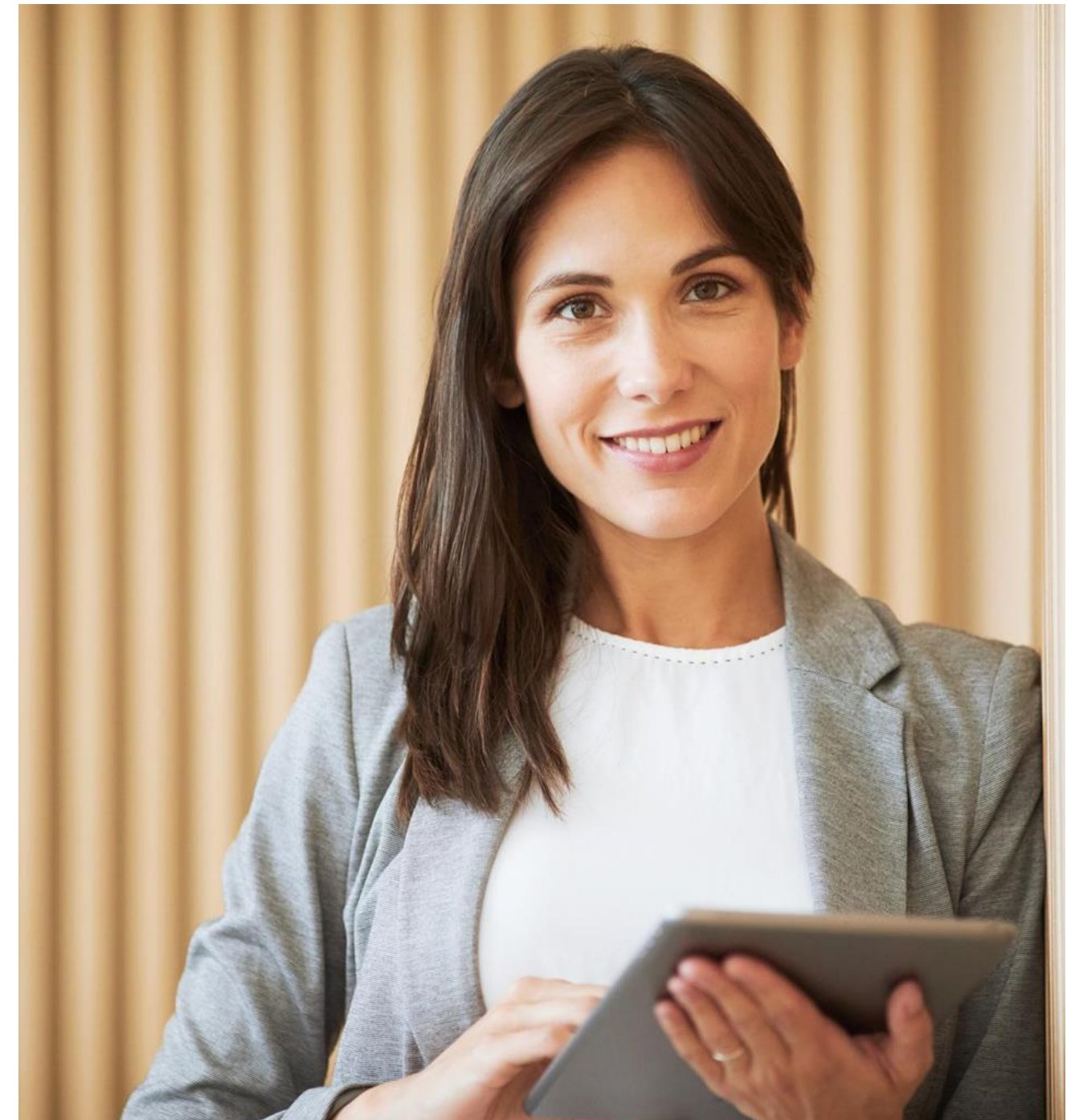
♥ Dedicated onshore team of SMSF specialists

- Financial Planner
- Senior Accountants
- Administrative Support Staff



♥ Quality controlled offshore team of SMSF specialists.

- Unlimited capacity.
- Ability to choose a dedicated full-time resource or activity-based resourcing.
- Management and training provided by onshore specialists.





Process

1

Initial Meeting

Meet with your We Love SMSF contact to discuss what services we can provide you.

2

Planning Meeting

- Discuss your needs
- Create a tailored approach to deliver your outsource solution

3

On-Boarding and Setup

- Establish logins and accesses
- Commence work handover.

4

Utilise Client Portal and Systems

- Track progress of client work
- Communicate with the We Love SMSF team.

5

Periodic Reviews and Feedback

- Provide feedback.
- Refine processes.



Tiered service offering for self-managed superannuation funds

- Defined up-front pricing.
- Clear service expectations.
- Ability to add additional services as needed.

Foundation

Cash Accounts, ASX Listed Share Trading, Wrap Investments and Term Deposits from approved list of Australian SMSF banking service providers.

Standard

2 x Property Investments PLUS Foundation from ANY Australian SMSF banking service provider

Progressive

Up to 10 Property Investments, Crypto Currency, Metals, Other Allowable SMSF Investments, Complex Member Balances PLUS Foundation from ANY Australian SMSF banking service provider



Why we excel in providing outsources solutions



Client Communication Portal and App

- Communication
- Efficiency
- Transparency
- Security



Dashboard Access and Monthly Reconciling

- Up-to-date reporting
- Improved decision making
- Peace of mind
- ONLY for "Standard" and "Progressive" tiered services



FIRST 10 FIRMS GIFT

First 10 firms that engage We Love SMSF services before the 30th of September 2023 will be able to add on the **"Dashboard Monthly Reconciling"** service to 5 funds engaged for **"Foundation"** service for 6 months at no extra cost.

WE 

PERFORMANCE

RECRUITING

EMPLOYEE

POTENTIAL

WE LOVE
RESOURCES

HR

TRAINING

RESEARCH

LEADERSHIP

SKILL

There's no need to spend extra resources creating a Human Resources department when you can outsource your HR support to us. We can also provide the HR policies and procedures your business needs.



WE LOVE HR



Offshore Direct Resources

- ♥ Focus on re-engineering your team on the value add for your clients + offshore / outsource workflow, compliance and administrative tasks.
- ♥ Your own direct resource via our
- ♥ We Love HR BPO.
- ♥ Philippines based team.




Advantages of Offshoring

Access to a vast talented pool of candidates	Save \$\$\$ over the long term	Save Time & Effort on tedious tasks
Flexible & Scalable	Greater Availability - Extended Working Hours	The Client owns the processed and IP
Direct selection & control of staff	No long term contracts	Employees become long term, value adding members of your team



Challenges & Concerns of Offshoring

Panic + Concern from Current Team	Choosing the Right Service Provider	Data Protection + Security
Communication Skills	Cultural Differences	Australian Experience
	Management & Training or Staff	Set + Forget Mentality



WE LOVE HR

Indicative Pricing by Role

	Junior		Intermediate		Senior	
	Years	From \$/mth	Years	From \$/mth	Years	From \$/mth
Tax	<2	\$3,000	2 to 4	\$3,500	4+	\$4,200
SMSF	<2	\$3,300	2 to 4	\$3,900	4+	\$4,550
Bookkeeping	<1	\$2,815	2 to 4	\$3,250	4+	\$3,500
Marketing	<1	\$2,800	2 to 4	\$3,300	4+	\$3,600

Costs includes salary, sick pay, holiday pay, 13th month pay, private health, and other mandatory government contributions.



WE 

**WE LOVE
COACHING**

**Less Stress
More Profits
Happier Clients**



Why Accountants Come to Us

- ❖ Burnt out sole practitioners or two partner firms
- ❖ High staff turnover
- ❖ Unappreciative clients
- ❖ Dwindling profits because higher costs and same fees
- ❖ Staff too scared to talk to clients
- ❖ Don't know what to do achieve growth



WE LOVE COACHING



Why Most Accountants Don't Have High Performance

Seem familiar?

Time to STOP IT....NOW



Our Delivery

- ♥ 1-2-1 Leadership and Mindset Coaching for Executives
- ♥ Team Training for High Performance
- ♥ Key Profit and Growth Driver consultation in conjunction with WL/CFO
- ♥ Review Sales, HR, Systems and Production processes
- ♥ Behavioural Analysis and Reporting





What Our Clients Achieve

- ♥ Higher profits and growth
- ♥ Focus on the work they enjoy
- ♥ Positive relationships with their clients
- ♥ Dynamic and positive team culture
- ♥ Become employer of choice



Leader's Effect On Organisation



Motivate Your Team and Grow Your Profits

- ♥ Eliminate confusion, uncertainty and miscommunication
- ♥ Become a leader that can inspire your team
- ♥ See your team's confidence and skills grow
- ♥ Experience higher productivity and profitability, as well as client satisfaction.

Take away the guess work on how to achieve this... you can't afford trial and error in today's very tight labour market. It drains your energy and profits. Through our coaching program and our behavioural tools, we can show you how to do it easily and effortlessly.

- ♥ eDISC Reporting
- ♥ Emotional Intelligence Reporting



Gift for LYD Members

Behaviour reports and coaching session debrief for the principal. Because you need to take care of yourself first!

 **Usually \$995**

 **First 10 receive it for \$395**

And till end of October \$595 if use the code : LY-WLCoaching