

The BGEM Compass

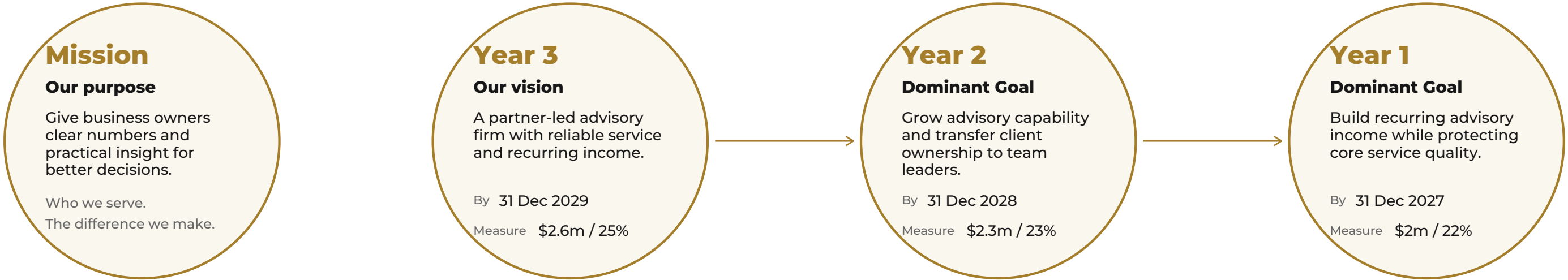
Ecosystem 1 of 3 | 12 staff. Baseline: \$1.6m revenue, 18% operating margin.

Member Riley Chen, Partner

Business Clearview Accounting

Period Jan 2027 to Dec 2029

Review Every 6 weeks



The 4/16

Four critical outcomes required to achieve the Year 1 Dominant Goal.

Set four measurable milestones for each outcome. Give each milestone a due date.

Critical outcome 1 \$1.5m core accounting revenue Target / owner Practice Manager	Critical outcome 2 \$500k advisory revenue Target / owner Advisory Partner	Critical outcome 3 Achieve 22% operating margin Target / owner Managing Partner	Critical outcome 4 Reduce partner delivery dependence Target / owner Practice Manager
1.1 Renew the core client portfolio Measure 95% clients retained Due 31 Mar	2.1 Sell paid cashflow reviews Measure 10 engagements signed Due 31 Mar	3.1 Agree fees and scope for all work Measure 100% new work scoped Due 31 Mar	4.1 Assign portfolio team leaders Measure 3 leaders appointed Due 31 Mar
1.2 Complete first-half core work Measure \$700k revenue YTD Due 30 Jun	2.2 Deliver first-half advisory work Measure \$200k revenue YTD Due 30 Jun	3.2 Reduce unbilled completed work Measure WIP over 30 days <10% Due 30 Jun	4.2 Transfer routine client meetings Measure 60% led by managers Due 30 Jun
1.3 Clear scheduled filing backlog Measure 95% on-time delivery Due 30 Sep	2.3 Expand recurring advisory plans Measure 25 active clients Due 30 Sep	3.3 Improve fee recovery Measure Write-offs below 3% Due 30 Sep	4.3 Develop a second reviewer Measure 2 qualified reviewers Due 30 Sep
1.4 Deliver the core revenue target Measure \$1.5m recognised Due 31 Dec	2.4 Complete advisory revenue target Measure \$500k recognised Due 31 Dec	3.4 Deliver annual operating profit Measure \$440k profit Due 31 Dec	4.4 Prove leadership coverage Measure 4-week partner absence Due 31 Dec

Guiding principles

The behaviours that guide how we deliver.

Principle 1 Clarity creates confidence By this we mean Explain the numbers in language the client can act on.	Principle 2 Accuracy earns trust By this we mean Check the work and resolve discrepancies before reporting.	Principle 3 Advice with purpose By this we mean Connect each recommendation to the client's business decision.	Principle 4 Shared accountability By this we mean Own deadlines, raise capacity issues early and develop others.
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Fictional example. NZD excluding GST. Circle measures: annual revenue / operating margin after owner salary. Milestone dates are in 2027.