

# ACCOUNTANTS' ★ SUCCESS STORIES ★

MAKE A DIFFERENCE

## “Still the best!”

“I can trace 72 new business clients to the seminars we've built around your consulting protocols, KPIs, benchmarks, trend analysis and what-ifs etc. That works out to annual fees of around \$500,000 this year and every year ... with more to come. You are a visionary and the keeper of the CPA soul.”

*Michael O'Kelley, California, USA*



*Ric Payne, CEO, Principa*

## 2 new clients yield \$40k in fees...

“Recently we signed up two clients into our fixed price annual set of services which yielded the practice \$40k in additional fees. Needless to say GamePlan was a central feature of the services to be provided and this example is typical of the success we enjoy through our Principa Alliance membership. Not only is GamePlan instrumental in lifting the level of our service capability it is a great selling tool through its analysis (and presentation) of a prospects past year's performance. Keep up the great work Principa!”

*Kerry King, Queensland, Australia*

## My client said ... “JOIN!”

“Before I joined the Principa Alliance I entered a client's data into the GamePlan software and sent him the Management Reports to get his thoughts. He called me the very next day and said just one word ... “JOIN!”

*Cliff Jenner, United Kingdom*

*Hello,*

Advisory firms all around the world have elected to become members of the Principa Alliance, a global network of consulting professionals. Our members share a common vision – the same vision that Principa has for helping **small and medium sized business** owners run a better business and enjoy a better quality of life.

These practitioners are helping their clients in new ways, working less, earning much more than ever before and discovering a new enthusiasm for their work.

On the following pages you'll hear from some of our members and former Boot Camp attendees around the world on how our consulting tools are helping them build a more valuable business and have more fun.

I hope you enjoy reading their comments and importantly, I hope it inspires you to explore the opportunities available to you as a member of the Principa Alliance.

*Ric Payne, CEO, Principa*

## “100% behind Principa's vision and purpose ...”

“Our organization has worked with Ric Payne and his associated companies for the past decade and we are 100% behind Principa's driving objective of helping CPAs and Consultants make a real difference in the lives of their small to mid-sized business clients.”

*John Dunleavy, [Former] Exec. Director,  
California CPA Education Foundation*

## 20% Growth Each & Every Year for 10 years!

“I've been tracking our growth since I first attended your Boot Camp program a decade ago.

By implementing your strategies, we've averaged 20% growth each and EVERY year since Boot Camp.

AND we've never had more fun doing what we do. Thank you—it works!!”

*Mike Amspacher, Washington, USA*



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# Principa is producing the Holy Grail!

"Principa continues to provide tools and resources that can easily be utilized by busy professionals. Tools that enable them to REALLY do Business Development work. For those of us in the profession that really want to make a difference to our clients business and their life, Principa is producing the Holy Grail.

*Brad Sewell, New South Wales Australia*

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## "Support team is the best in the business"

"Your support people are among the best in the business! Your team members should be acknowledged for delivering truly superior customer service. The friendliness and accuracy with which they have answered all of our needs has been great."

*Larned S. Whitney, California, USA*

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## "... consulting substance and 'meat' ..."

"I want to say thanks for all of the incredible work you are doing through Principa. You were always the one who provided us with the meat and substance ... the consultant "guru" that we all appreciate and need. I firmly believe that more firms will move to Principa once they understand all that you are now doing."

*Tom Wagner, Florida, USA*



*Kerry Payne, Co-Founder Principa*

## "Passion and purpose ..."

"Our Practice Development Team is driven by making a *difference*, not simply by making a living. Our team members love what they do, they understand better than most that passion comes from serving a "higher purpose," they are here to help you achieve a more financially and professionally rewarding business life and through that, a better personal life.

Their passion for what they do is evidenced by the results their clients are achieving and by the fun they have doing what they do every single day. "

*Kerry Payne— Vice President, Principa*

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## No longer just a "tax-planner"

"Last night I presented GamePlan graphs to seven partners of a firm of lawyers. I was invited to the meeting to talk to them about year end tax issues but I was able to blow them away with a discussion about many management issues that were not apparent to them before. All this was possible because of a few hours I spent entering 5 years historical data into GamePlan. The result...this firm has been a client of our firm for 14 years, for the first time they now think I am more than a tax planner."

*Philip Arnfield, South Australia*

## "Vision...!"

"Thanks again for your vision, insights and enthusiasm. You're a beacon of light for those of us groping about in the dark! You inspire us, educate us, challenge us and lead us. Thank you."

*Brian Middleton, Western Australia*

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## 'Next generation' of all the 'stuff' we need!

"Principa is providing the good, practical 'next generation' of 'stuff' that we need. Ten marks out of ten again Principa!"

*Mark Pribble, California, USA*

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## "The substance we've always wanted and needed ..."

"Great! Excellent! The substance we have always wanted and needed, but have been missing. With your group's knowledge, talent & commitment, this will be the alliance that will lead the 'firm of the future'. Thank you!"

*Maria Bernston, California USA*

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## Infinitely better than TBR!

"I have really been working with GamePlan and I am so delighted! I can now completely forget about TBR – this is infinitely better. The more I play and adjust for different scenarios the more impressed I become. My kudos to you on this terrific application."

*Patrice Smith, Washington, USA*

## GamePlan is PHENOMONAL!

“The GamePlan software is just PHENOMONAL! I know our clients will feel they’ve got tremendous value from us every time we send them away with the summary operating reports.”

*Tim Munro, Queensland, Australia*

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## So far— so WOW!

“In the words of one client: ‘So far, so WOW!’ The buzz that these products create is unbelievable. Actually, our clients are reacting the same way I did when first I saw GamePlan. The Digital Dashboard just takes it to a whole new level. You guys are an absolute pleasure

to work with. Thank you.”  
*Maeda Palius, California, USA*

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## “...Integrity in business AND we’ve doubled our revenue!”

“We made our decision to join the Principa Alliance based on the integrity we see in your organization (that made it easy). You’ve confirmed my belief that your mission is to make a difference in the small to medium business market through CPA firms. We’re on the same page and I believe our rewards will come naturally if we help others. Since attending Boot Camp my practice revenues have doubled. You’ve helped me address the FTI challenge and I am very excited about our affiliation with you.”

*Jeff Miller, Georgia, USA*

## ‘You’ll help many in our profession..’

“I am really glad I have joined up with Principa ... after seeing what you guys are building, it was a straight forward decision. So thank you for deciding to pursue what you are doing with Principa. It will help many in our profession.”

*David Brown, California, USA*

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## Delivers everything (and more) we’ve come to expect...

“Many of us have been there, done it and are perhaps are getting a bit stale. Although developing your practice is a never-ending process, it is easy to become complacent no matter how successful you have been in the past.

I have been saying for some time that I needed another Boot Camp transfusion - now I have received it.

The difference is that I don't now need to be dazzled by Paul's fireworks - as good as they were.

When you strip away all the trappings, what you are left with is the power of Ric Payne's software and clarity of thought.

Ric delivers everything (and more) we have come to expect.”

*David Gill, Kirkaldy United Kingdom*

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## Outstanding!

“You’ve encouraged us to keep moving forward at a fast clip.”

*Fritz Leucht,, Indianapolis, USA*

## Unmatched!

“Your tools, training and networking are unmatched.”

*Brian Jost, New Jersey USA*

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## “ Inspired thousands of CPAs!”

“You’ve done a wonderful job of inspiring thousands of accountants (a feat in itself) to reach for more satisfying ways to do business. Your humor and passion brought to life the theories and ideas which are so essential to good management. Just yesterday our management team met and several of our most astute directors were quoting principles we learned from you several years ago. You have been a great influence on our firm.”

*Cleone Smith, Colorado, USA,*

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## 2 new leads every month!

“I send out your “Profit Builder” Newsletter and I receive no fewer than two quality new client leads from it each and every month.”

*Mike Takaki, California USA*

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## \$115,000 in new business fees!

“We’ve signed up 12 clients onto DashBoard monitoring services and added \$115,000 in new fees to the firm. And we’re in a small regional town in New Zealand, with small, ‘average’ business clients! They love this stuff. GamePlan and DashBoard are key to our success in adding value to our clients.”

*Bob Bowley, New Zealand*

# The best business analysis & planning system I've seen!

"Back in 1997 I attended the Accountants' Boot Camp at Whistler. At the time I thought it was the most exciting thing to hit our profession and implementation challenges aside, I have achieved some outstanding successes that I can attribute at least in part to those 4 days I spent at Whistler.

I recently took a look at the tools that Ric Payne has been working on with his new organization Principa. You are probably aware that Ric left Results Accountants' Systems (now, as you know, RanOne) in 2001. Ric founded Principa with the express purpose of continuing the work that he started at RAS, namely, to help CPAs and CAs provide business consulting services to their SME clients. I was very impressed when I saw the resources and tools they've created!

I think it's fair to say that we all knew that he was the source of the real meat in the RAS material and that comes through loud and clear when you see the things that he and his team have created in just one year.

His business software application called GamePlan is tremendous. I've researched many different business software applications (from Accpac CFO, to Performance Views, to TBR, to various Cash Flow software programs) and I'm not kidding when I say this is **the best business analysis and planning system I have ever seen.**

He's also created an application called FirmPlan that embodies the Digital Dashboard concepts he's been talking about for some time. **It's amazing and quite frankly, I believe this is going to revolutionize the way we communicate financial results to our clients.** Even if you have no desire to do business consulting, the Dashboard is a wonderful source of additional revenue and a differentiator for your firm. You owe it to yourself to check out what Principa and the Principa Alliance have to offer you and your business small and mid-sized business clients."

*Mark Holland, Victoria, Canada*

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## "...More relevant than Ran One ..."

"My recent previous experience was with Ran One. Principa's philosophies are so much more relevant."

*Todd Eggars, USA*

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## "...a major wake up call!"

"Challenging ideas, all presented in an interesting way, and with an endless supply of opportunities and solutions!"

*Allan Johnson, Queensland, Australia*

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## "A profound effect on my career..."

"Though I have not met you personally, I would like to let you know that you and your work has had a profound effect on my career. And by that I mean *profoundly wonderful.* Business Development is amazing work."

*Joni Driscoll, Washington, USA*

## "I can now see the forest above the trees!"

"I am forever grateful for being able to remove myself from all the 'trees' that were surrounding me and rise above it to see the 'forest'. It was the first time in my professional career that I was able to do that. Your approach to the profession gave me the confidence and self-respect that quite frankly, I deserved. I attended one of your seminars in July 1997. Since that time my profit has grown substantially. But money isn't the point. I have never felt so good about myself, my professional abilities, nor have I loved servicing my clients so much as now. *Dominic Ruso, Ontario, Canada,*

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## "...a rewarding partnership."

"Every now and then we need to step back and reflect. Out of curiosity I revisited my "pre Boot Camp" (2000) numbers and compared them to my 2002 results. Firm wide fees are up 74%, my team is 57% larger, billable hours are up 39% and best of all, *Partner Billable hours* are DOWN by 30%. Hard work and an open mind can make a difference and I am sure we are headed in the right direction. It's been a rewarding partnership. Thank you. "

*Kevin Niedoba, New Jersey, USA*

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To discover how membership in the Principa Alliance can help you grow your firm, enjoy your work and deliver even more valuable services to your small & mid-sized business clients, contact a Principa Practice Development Advisor.

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