



**RêveNew**  
practice management

Your practice  
made perfect.

## Workshop Directory

- Seminars
- Presentations
- Retreats & Boot Camps
- Speakers
- Individual Consultation

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## A Note from Jean-Guy Talbot, FCPA, FCGA

RêveNew Practice Management/Talbot & Associates  
Founder & CEO

Having been in practice for over 25 years (and going strong), I've been asked more times than I can count why I get up in the morning and do what I do.

There's more to life than money (seriously, I mean that).

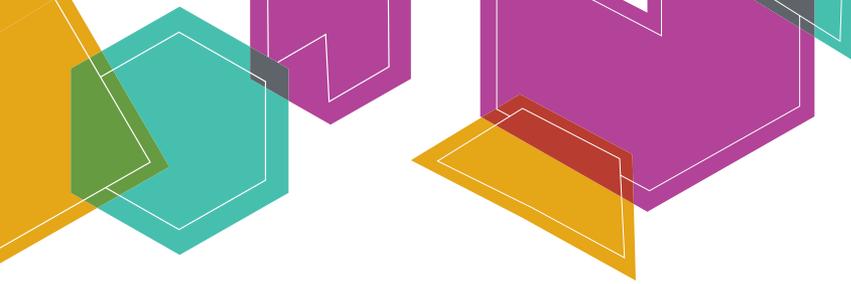
It's about making a difference in people's lives (I mean that too).

I am fortunate enough to spend my days pouring into the lives of my wife, children, team, colleagues and clients (almost all of them I affectionately call friend). I have the privilege of being a husband, father, accountant, leader, coach or mentor. Truthfully, they'll probably never know how being that for them makes my world spin. But, in order to be all those things for all those people, I must always keep learning.

I truly believe that we should always strive to be inspired, learn and *be* more. With that in mind, RêveNew Practice Management (RPM) is excited to provide an intriguing selection of workshops and retreats aimed to expand your knowledge and increase success in both your business and personal life.

At first glance, the topics offered seem geared for just accounting professionals. Although that is the main industry we specialize in, I assure you – there's something here for everyone. Our wide variety of workshops are jammed-packed with quality content and taught with our trademark entertaining methods. After you attend one of RPM's workshop or retreats, you just may find yourself coming back for more.

- JGT



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## About RêveNew Practice Management (RPM)

RêveNew Practice Management is a warm and knowledgeable coaching team led by Jean-Guy Talbot, FCPA, FCGA and backed by the Talbot & Associates team. We exist to guide small and medium-sized accounting practices through the transformation process and lead them to unimaginable success. We're passionate about showing practitioners how to make time for the more important things like family and a better quality of life. Through our coaching and the strategies contained in our RPM Practice Playbook, you'll learn the secrets to earning more money than you ever thought possible – while working fewer hours.

Let us show you how to:

- Work less and make more
- Live a better quality of life
- Make time for the important things
- Motivate your team
- Do things you thought unimaginable

**We don't make money until you do.**



## About Talbot & Associates

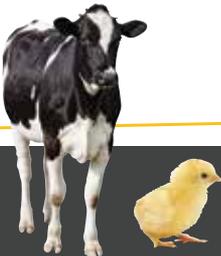
Talbot & Associates is the sister company to RêveNew Practice Management. It is a bilingual accounting firm that has been serving Manitobans for over 25 years. With locations in Ashern, Birtle, Notre-Dame-de-Lourdes, Oak Bluff, Steinbach, and Winnipeg (St. Norbert & St. Boniface), our team of over 60 staff offer a wide range of services steeped in decades of combined experience from varying backgrounds. We treat our clients like family and are passionate about helping them uncover new opportunities and reach greater levels of success.

**Talbot & Associates offers a wide range of accounting and business services in both official languages. We have experience serving many specific industries including:**

- » Agriculture
- » Automotive
- » Commercial
- » Construction
- » Day Cares
- » Hotels
- » Hospitality
- » Manufacturing
- » Medical
- » Municipalities
- » Non-Profit Organizations and Associations
- » Pharmacies
- » Property Management Companies
- » Real Estate Companies
- » Residential
- » Restaurants
- » Retail & Wholesale
- » Service Industries
- » Transportation
- » Trucking
- » And more

### Our services include:

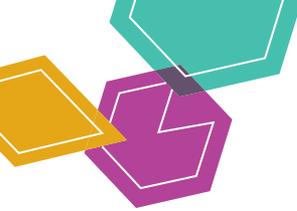
- » Accounting
- » Assistance with government and other farm programs (AgriInvest/ AgriStability)
- » Auditing
- » Computerized accounting setup
- » Corporate income tax
- » Estate planning
- » General transitions and succession planning
- » GST remittances
- » Management advisory services and consulting
- » Marketing services
- » Monthly and quarterly bookkeeping and data processing
- » Non-auditing services
- » Partnership and networking
- » Payroll services
- » Personal income tax
- » Preparation of financial proposals
- » Quickbooks tech support
- » Simply Accounting tech support
- » Strategic plan development
- » T3s estate and trust tax returns
- » T4s, T5s, T5018, information slips
- » U.S. tax returns and services



**BIG FIRM SMARTS**  
*small firm hearts*



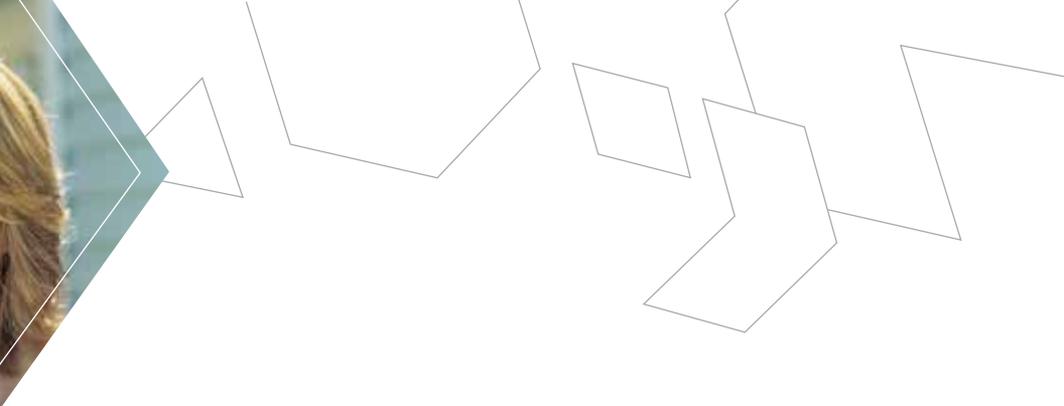
**TALBOT**  
ASSOCIÉS • ASSOCIATES



# Client Testimonials

*“The energy, enthusiasm, advice and assistance with challenges of running, growing, and enjoying an accounting practice coming from Jean-Guy and his staff is priceless. By the time we had worked with Jean-Guy for only 18 months - I had already added more employees and moved my office to accommodate more growth. His encouragement to continue learning, not only about our professional work, but about personal growth, keeps me interested in ‘sharpening the saw’, moving ever more forward to an interdependent life.”*

*“We asked Jean-Guy to visit our city and help us with our very first firm retreat. Two of the four of us are relatively new to the firm, one had only been with us four weeks before plunging into a meeting designed to help us chart a path for a new future. We’ve started thinking about defining a mission and vision which speaks to us and which we can effectively communicate to clients, cementing our goals of helping them live their dreams too. Jean-Guy carefully guided, chided, and provided many ways for us to think about who we are, what we are, why we care and how we can better serve the people who help us live our dreams. It was a valuable weekend that we look forward to repeating.”*



*"When we are attempting to learn a new system or considering another method of marketing, his people step up without hesitation. Learning to implement a new time and billing system is arduous; changing our habit of using one system to another, learning new codes, learning new ways to invoice clients, all take time. Yet anytime we've asked for help, we've received it promptly and courteously."*

*"I think one of the things I appreciate most about Jean-Guy and his team is how they've helped me take control of my practice and therefore, control of my life. Jean-Guy's assistance has allowed me the luxury to concentrate on my personal life and family when I really needed to."*

*"Having Jean-Guy and his team as backup makes my office more confident in the advice that we are giving clients. Having the team there to bounce ideas off of and to help deal with frustrations reduces the stress of running my practice."*

## Workshops Overview

Both Talbot & Associates (T&A) and RêveNew Practice Management (RPM) offer a wide range of courses, retreats, keynote speakers, sessions and presentations. Speakers associated with each topic vary depending on their area of expertise. We cater our workshops to groups and individuals on a per need basis.

## RPM Training Centre

In 2016, we opened the RPM/T&A Training Centre at 3549 Pembina Highway in Winnipeg, Manitoba. It's an upscale classroom and event venue in one. There's plenty of free parking and a hotel across the street. It's home to all T&A and RPM scheduled workshops.

## Workshop FAQ's

### **Can I book a RPM speaker for my conference, convention or event?**

Absolutely! Our team has spoken at events across North America. Most of the speakers are bilingual and can also present some of the workshops in French. Most of our sessions can be tailored to fit one hour, 90 minutes and half-day time slots. Some workshops can be grouped together for a full day if required.

### **Can I book an RPM speaker for my employees?**

You bet. We can offer all of our workshops on site at your work place, retreat centres or another almost any venue of your choice.

### **How can I find out about RPM workshops that are scheduled?**

Visit [renew.ca](http://renew.ca) and view the news section for all upcoming events, where RPM will be or contact us to learn more at [rpm@talbotcpa.ca](mailto:rpm@talbotcpa.ca) and ask for your call to be directed to the RêveNew Practice Management workshop coordinator.

### **How can I inquire about booking an RPM speaker, venue or any other questions?**

Email [rpm@talbotcpa.ca](mailto:rpm@talbotcpa.ca) or call (204) 269.7460 and ask for your call to be directed to the RêveNew Practice Management workshop coordinator.

## The RPM Team



### **Jean-Guy Talbot, FCPA, FCGA**

*RêveNew Practice Management / Talbot & Associates  
Founder & CEO*

Jean-Guy Talbot, FCPA, FCGA is the founder and CEO of the accounting firm Talbot & Associates (T&A). He started his career in accounting in 1983 by working in public practice for Winnipeg firms as well as a few years in industry. He started T&A on a part-time basis in 1987 and grew his practice from a one-person operation to its current size of over 60 staff in six locations across Manitoba. Nationwide, colleagues and clients refer to Jean-Guy as both a knowledgeable mentor and friend. He has devoted a tremendous amount of research, time and energy to discover the secrets of running a better practice. He has personally implemented all he's learned and has determined which roads lead to a successful practice and which do not. He is passionate about sharing this knowledge with others and established RêveNew Practice Management on that basis. In order to bring this passion to the masses, Jean-Guy travels to across the country to speak and consult firms and also in 2015, built a 7,000-sq-ft training and event centre at T&A headquarters. In 2016, Jean-Guy received the title of Fellow CPA on behalf of CPA Manitoba. FCPA recipients are recognized as members who have rendered exceptional services to the profession or whose achievements in their careers/community have earned them distinction and brought honour to the profession.



### **Kayla Doerkson**

*RêveNew Practice Management / Talbot & Associates  
Director of First Impressions*

Kayla joined RêveNew Practice Management / Talbot & Associates in early 2016 bringing with her stellar attention to detail and client service skills. In 2012, Kayla completed the Bachelor of Arts program of at the University of Manitoba majoring in Psychology. In 2015, she received her Canadian Accredited Insurance Broker designation. Kayla is passionate about contributing to our clients' in any way she can. Kayla would love to publish a novel in the future.

# The RPM Team



## **Tannis Hogue**

*RêveNew Practice Management / Talbot & Associates  
Marketing Services Manager*

Tannis unites people and ideas by breaking down the barriers that limit connection and opportunity. She is passionate about showcasing the value that individuals and companies can bring to the table. She brings with her over 20 years experience in the marketing/media industries including positions as VP, Marketing & Communications with Economic Development Winnipeg and similar roles with Manitoba Film & Music, CHUM Radio and Square One World Media. A skilled professional behind the scenes and in front of the microphone, she has a knack for blending strategy and fresh ideas to achieve results. Tannis considers it a privilege to help companies discover why they do what they do and facilitate the development of winning customer experience, strategic plan, brand, partnerships and creative marketing initiatives.

## We Provide Marketing Services

### **Marketing Education & Seminars**

We teach you what to do before you start promoting yourself, including how to develop a solid brand and carry out marketing initiatives that are relevant, consistent and compelling.

### **Strategic Plan Development**

Branding happens from the inside out. We create a document for your company that houses your goals, vision, mission, core values, target market focus, desired customer experience, and more. It will become the basis for your brand, team goals, website, staff manuals, partnership or financing proposals, campaigns, recruitment and more.

### **Brand Identity**

Whether you're starting out or looking to rebrand, we create your logo, positioning statements, imaging, brochures, business cards/stationary, signs, website content and social media profiles.

### **Pass the Baton**

Who will develop your marketing plan and ensure it is carried out well? If it's you – let us develop your marketing plan and consult you on a monthly basis. Or, we can facilitate matching you with marketing professionals, including looking after recruitment for your own marketing person.

### **Partnerships & Networking**

We connect you to specific partners, groups, associations, and opportunities and can assist you/your team on how to speak about and be ambassadors for your company.

**Contact us to set up a free information session:**

☎ (204) 269.7460 x 236

✉ [tannis.hogue@talbotcpa.ca](mailto:tannis.hogue@talbotcpa.ca)

# Workshop Topics

## ► Practice Management

**Description:** There are so many moving parts that will make a practice profitable. This workshop is a great place to start as it will touch on many areas of a practice without going too much into depth in any one. This workshop will provide an overview of the following topics which will then allow practitioners to get a better idea of which other presentations may be useful and if interest to them.

### Participants will learn:

- Key financial and performance numbers to watch
- Marketing in the accounting world
- Time management
- Employee performance, evaluation and how to motivate
- Pricing your services (value billing)
- And more



*Thank you both for everything you do over the course of the year. Whenever either Karen or I have a question, you have been there with a clear, plain language answer. Our concerns, I am sure, sometimes seem very basic to you, but you have never made us feel uncomfortable, and always make certain that we (I) understand the answer and procedure.*





### ► Negotiating

**Description:** Negotiating is a skill we start to learn as a toddler, but few ever learn to really master it. There are many courses offered on how to negotiate but this workshop is a good introduction with some great insight as to the ins and outs of negotiating.

#### **Participants will learn:**

- How to negotiate
- Improve your skills at negotiation
- Improve your odds of negotiating a better deal (every time)



*Just wanted to take a minute to say thanks for looking after the fine folks I sent your way last week! They had nothing but great things to say about you and your team and they were extremely happy with the level of service they received from both you and your staff. Make sure you tell your team that they are doing a GREAT job! You will also be meeting this week with a couple of my friends who are excited to see what you can do for them.*





## ► Practice Profitability

**Description:** Accountants are expected to know how to read and understand financial statements, and of course, be able to use them to better manage their practice. What is less evident is the extent to which accountants really do know how to use financial statements to increase the bottom line. Worse, pride will often prevent admission of this weakness. This workshop will concentrate on how to prepare financial statements that will really speak the truth that you really need to hear and see.

### **Participants will learn:**

- Insight on generating the information needed
- How to determine the right benchmark that everyone needs to understand to sustain a very profitable practice

### ► Effective Use of Time Sheets: Discovering the Gold Hidden Within

**Description:** “I hate time sheets! Why bother with them?” Filling out timesheets is a pain, time consuming and difficult. So why do it? The reason time sheets fail so miserably for most practices is because most practitioners are either not using the right time/billing software and/or not know how to use it. Proper use of time sheets will, without a doubt, increase firm profits by thousands and thousands of dollars.

#### **Participants will learn:**

- How to properly use time sheets
- How to generate all the benefits you had no idea a timesheet held
- How you can increase your bottom line immensely with very little effort



## ► Time Management

**Description:** Running an accounting practice, or any business for that matter, puts a tremendous amount of stress and demand on our time. Each day provides each of us a very limited amount of time. It's critical that business owners make every minute count. Prioritizing tasks is no easy feat, but good time management can make all the difference between always being stressed (or not) and running a healthy, successful and profitable business practice (or not.)

### **Participants will learn:**

- How to prioritize (better sort through tasks)
- What to delegate and what to not delegate
- How to increase production
- How to deal with technology (emails etc.)
- How to deal with time suckers



## ► Endorsement for Marketing

**Description:** Promotion of your firm is one of the keys to its success. This workshop will explain from an accounting firm owner's perspective why establishing a consistent, relevant and memorable presence in the markets you serve is so important.

### Participants will learn:

- Answers to key questions about why you should market your firm
- An overview of how a marketing plan is created
- How to establish a budget for your marketing initiatives
- Ways to measure results of your marketing efforts
- The role company culture plays in marketing
- Practical ways you can promote your firm in various markets

*\* This workshop is an overview as to the importance of marketing your firm in general. To learn more about the life cycle of a marketing program, see session descriptions Marketing I and II, led by RPM's Marketing Service's Manager.*



*I have a lot of respect for you, not only are you great at what you do, you're ethical and genuine all in one; a quality you own to be much admired. Thank you so much for that! I really appreciate it.*



## ► Marketing I: Lay the Foundation

**Description:** To get the most out of your marketing initiatives, we teach you what to do before you start promoting your company or organization.

**Who will benefit:** Owners/Management/Board Members of companies or organizations who are starting a company or non-profit organization or looking to rebrand.

### Participants will learn how to:

- Develop a solid brand
  - Determine target market group(s)
  - Effectively reach new potential clients
  - Best establish “must-have brand identifiers” such as logo, positioning statements, website, social media profiles, stationary, brochures, signs and more
  - Best develop a marketing plan
  - Be resourceful with a marketing budget
- 

## ► Marketing II: Next Steps for New Growth

**Description:** This course will offer a refresher of all the items covered in the Marketing: I: Lay the Foundation and build from there.

**Who will benefit:** Owners/Management/Board Members of companies/ organizations who have their brand well established and have a clear understanding of who their target market is.

### Participants will learn:

- All the types of marketing/promotional opportunities that are available
- How to carry out marketing efforts in a relevant, consistent and compelling way
- How to cross-promote with other companies, groups and individuals
- How to inspire your team/others to be ambassadors
- How to make the most of your marketing budget
- What’s involved in creating a marketing plan
- How to determine who should carry out your marketing plan
- How to measure the results of your marketing efforts



### ► Hiring: Selecting the right team members for a practice

**Description:** Selecting the right team members for your organization is far more challenging than most people think. Only once you become an employer do you fully understand the importance and difficulty of selecting the right candidate. This workshop will discuss ways of selecting the best candidate.

#### **Participants will learn:**

- What questions to ask to help bring out whatever attribute you're seeking?
- How to "sell" the opportunity of employment to a potential candidate
- How to negotiate a fair wage



## ► Employees: Retention and Motivation

**Description:** Most owners don't need to read studies done to know how expensive employee turnover can be. However, not all employers recognize or appreciate the difference a truly happy and motivated team can have on an organization's well-being and profits. This workshop will discuss ways to excite your team, thus help reduce employer's stress, but more important, help make everyone's life better and more fun than ever.

### **Participants will learn:**

- How to increase employees production
- How to ensure everyone is happier
- Reduce turnover



### ► Team Meetings and Retreats

**Description:** A business owner should never undervalue the power of great team co-operation. To have an entire team all rowing in unison in the same direction will contribute immensely to its success and fun of environment.

#### **Participants will learn:**

- The importance and reasons to hold regular team meetings
- How often to have team meetings
- How to ensure team meetings are constructive and not overly time consuming
- How to make team meetings profitable
- The tremendous benefits of annual team retreats
- How retreats can catapult a practice/business to extraordinary new heights if properly executed





## ► Buying and Selling a Practice

**Description:** For obvious reasons, few people have much, if any, experience in buying or selling an accounting or bookkeeping practice. We will look at this transaction from both sides of the coin – the buyer and the seller.

### Participants will learn:

- What to look for in a buyer when selling a practice
- How to know if a selling practice is right for you
- The elements that will influence the price which will help sellers prepare their practice for an eventual sale and give the purchaser the tools to negotiate a fair purchase price

“

*“I learned more in six hours than six credit hours at university.”*

”

### ► Balancing Work and Life

**Description:** This powerful and important workshop is designed to give business-owners who juggle the demands of children, spouse, employees, vendors etc. effective strategies for balancing work and life.

#### Participants will learn:

- How to receive and give adequate communication
- How to put up healthy guard rails such as learning when and who to delegate to
- Strategies for protecting your mental health – when and how to delegate to which staff



*"Thank you for facilitating our firm retreat this past weekend. We found this a very valuable exercise for our team. It was especially rewarding to hear each of the newspaper stories as each person read them to the group. There are so many things that we will take out of this weekend. Most of all, we all want to continue to do these types of events in the future. Again, thanks for coming all this way to assist us."*





## ► RêveNew Practice Management Retreats & Boot Camps

### RETREATS

**Description:** RPM hosts retreats on site at the venue of your choice. Our RPM/T&A Training Centre is available for your team of up to 70 as well. All of our retreats are presented in a fun and/or engaging manner.

The retreat includes any of the following:

- SWOT analysis
- Direction of the firm/company
- Efficiencies
- Marketing
- Concentration on employee growth (how they see themselves, what they want for their futures, what they like/dislike etc.)
- Looking ahead to be a cutting-edge firm

*\*All retreat content is customizable and is really dependent on a consultation between Jean-Guy/team and the organizer.*

### BOOT CAMPS

**Description:** Clients can book RPM for a 2-5 day period to present all of RPM's workshops to management or the whole team. After consultation with the organizer, we can customize a program combining many of our workshops and seminars together.

## Contact Information

Phone: (204) 269-7460

Email: [rpm@talbotcpa.ca](mailto:rpm@talbotcpa.ca)

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[renew.ca](http://renew.ca)



**RêveNew**  
practice management

| Your practice  
made perfect.