



**Breaking the limiting beliefs on
how big you can grow your firm**



Your hosts



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Agenda

- Kristy's story
- Common limiting beliefs of growing firms
- Why mindset matters
- Real-life examples
- 3 mindset shifts
- How to take action
- Q&A



Kristy's story

- Then & now
- Building a business from scratch
- The **one thing** that changed her life and her business

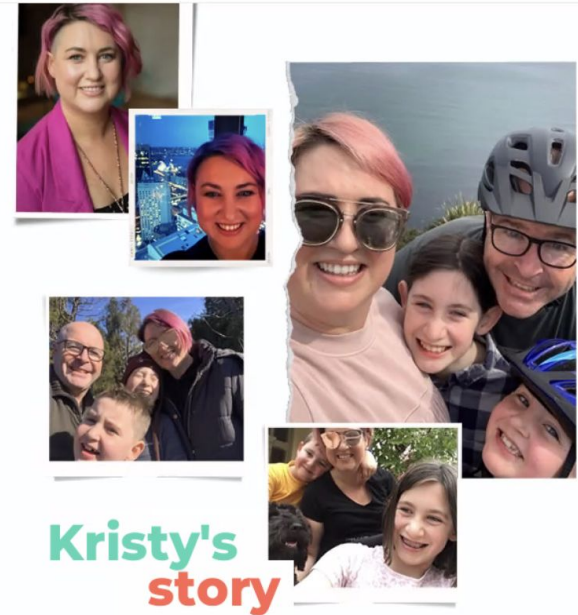
Then VS Now

Before

- Prioritising client work over family
- No annual leave
- Scared of hiring
- Struggled to delegate
- Goals with no clear path.
- Working IN the business more than ON the business.
- Will I always need to 'work' when I go anywhere?

After

- Time off over Christmas and Easter school holidays.
- Client managers and production team working together to deliver on client fulfillment.
- Growing my leadership skills.
- Owning my CEO title.
- Knowing my revenue goal to achieve my passive income goal.
- Feeling more in-control than controlled by my business.
- 2 week holiday in Paris.





Common limiting beliefs in a growing firm

- “My firm can’t grow beyond this size.”
- “I need to be involved in everything for my firm to succeed.”
- “Scaling means more work and stress.”

“

Begin with the
end in mind.

Stephen Covey





Why mindset matters

Remember, your firm's growth starts with how you think about it.

The power of a growth mindset:

- How your mindset directly impacts your firm's potential
- Breaking the cycle of limiting beliefs is the first step to unlocking growth



Real-life examples

Chan & Naylor

- 30+ years in the industry with 5,000 active clients
- Ed Chan hasn't worked a day IN his own firm in the last 20 years

Sky Accountants

- 20+ years in the industry + a \$7 million dollar firm
- Jamie Johns works 1 day a week



Mindset shift 1: Delegate to elevate

Limiting belief: *"I need to be involved in every decision."*

New mindset: Empower your team to handle more, so you can focus on growth

- Build a strong leadership team
- Free yourself from the day-to-day tasks to focus on strategy



Mindset shift 2: Think bigger

Limiting belief: *“My market is too small to grow.”*

New mindset: Expand your vision beyond current clients and markets

- Explore new service offerings and niches
- Look at opportunities for acquisitions or strategic partnerships



Mindset shift 3: Growth \neq burnout

Limiting belief: *“Scaling will mean more work and more stress.”*

New mindset: Build efficient systems and processes to scale without sacrificing quality of life

- Use technology and automation to streamline workflows
- Develop repeatable systems to reduce stress



How to take action

1. Identify one limiting belief holding you back
2. Reframe it with a new, empowering belief
3. Take one actionable step today to challenge that belief



Q&A





This playbook is your pathway to a 7-hour workweek



With this exclusive playbook authored for accountants by accountants, you will find answers to:

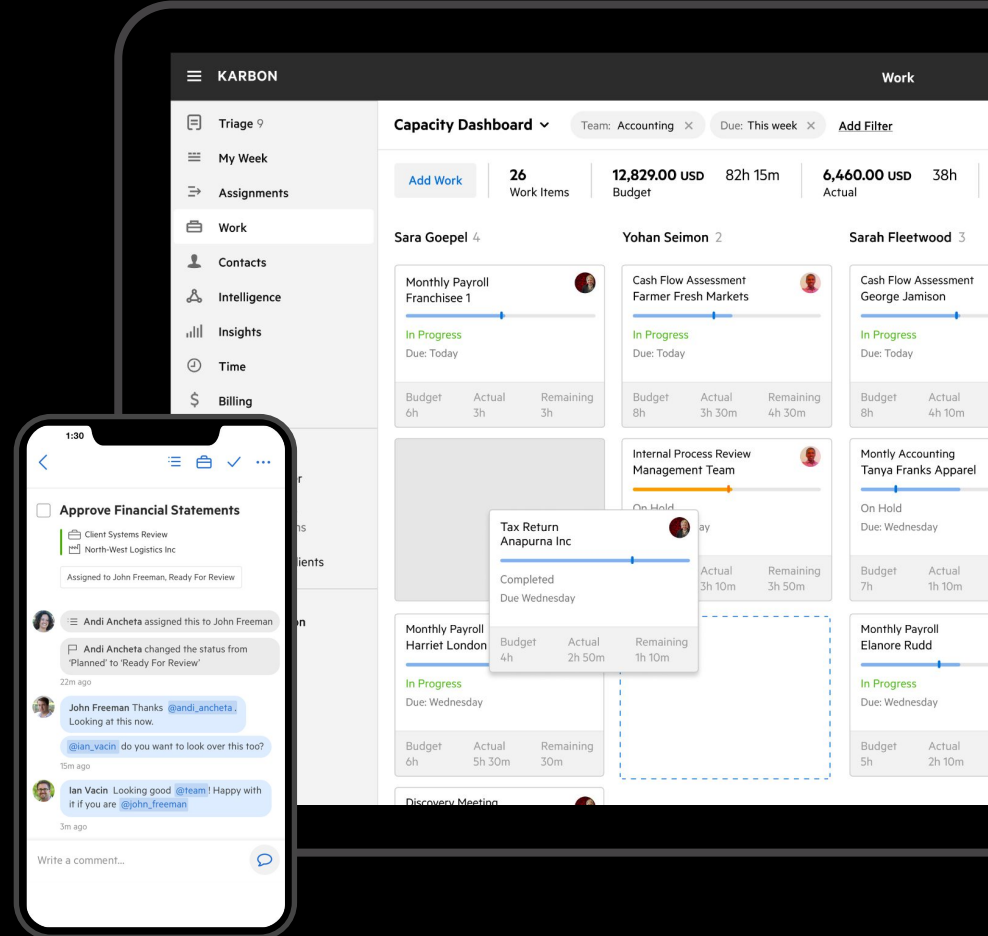
- ✓ How do I stop trading my time for the sake of growing my practice?
- ✓ How do I stop wearing all the hats and withdraw from jobs in my practice?
- ✓ How should I divide my time if I want to grow my business?
- ✓ What's the proven pathway to freedom in an accounting business?



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Thank you

Reach out to Wize Mentoring at
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feedback, or need further guidance.

