

Part 3 (of 3) Capacity Exchange: Where Client Revenue & Team Capacity Meet



with Jason M Blumer, CPA CEO, Thriveal CPA Network CEO, Blumer CPAs

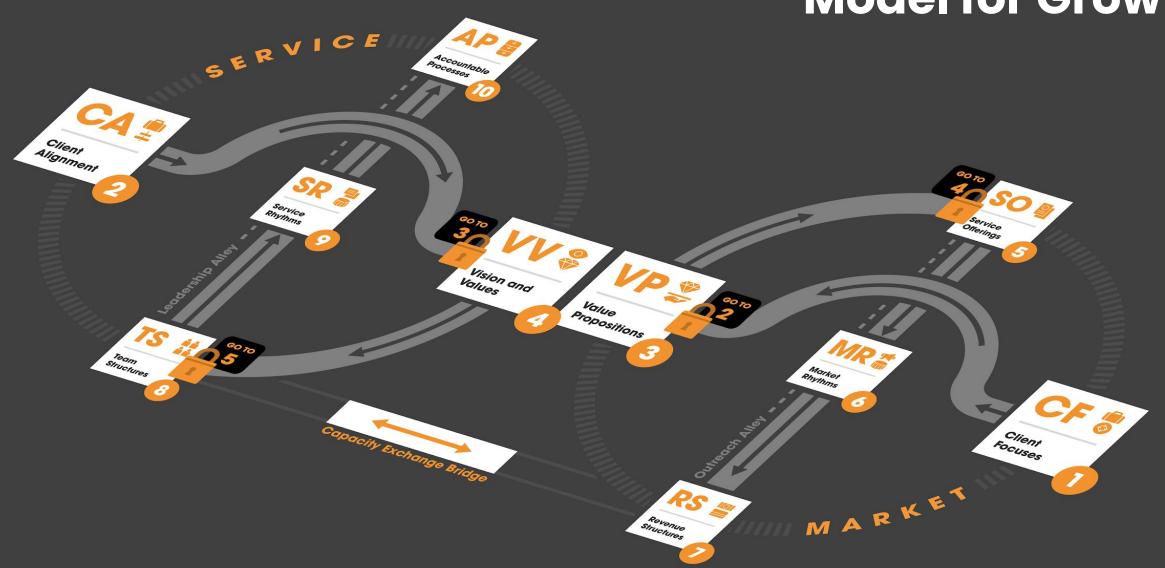
Our Karbon Capacity Webinar Series:

- 1. August: Understanding the Realities of Human Capacity

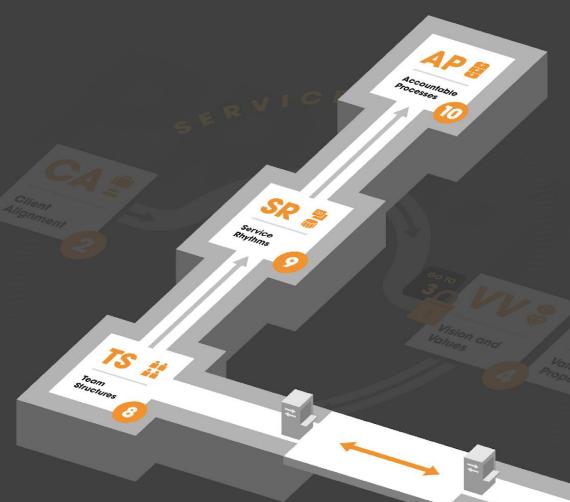
 2. September: Competitive Capacity
- Management
- 3. Today: Capacity Exchange: Where Client Revenue & Team Capacity Meet

karbonha.com/resources/the-realities-of-human-capacity/

Thriveal's Prototype Components Model for Growth

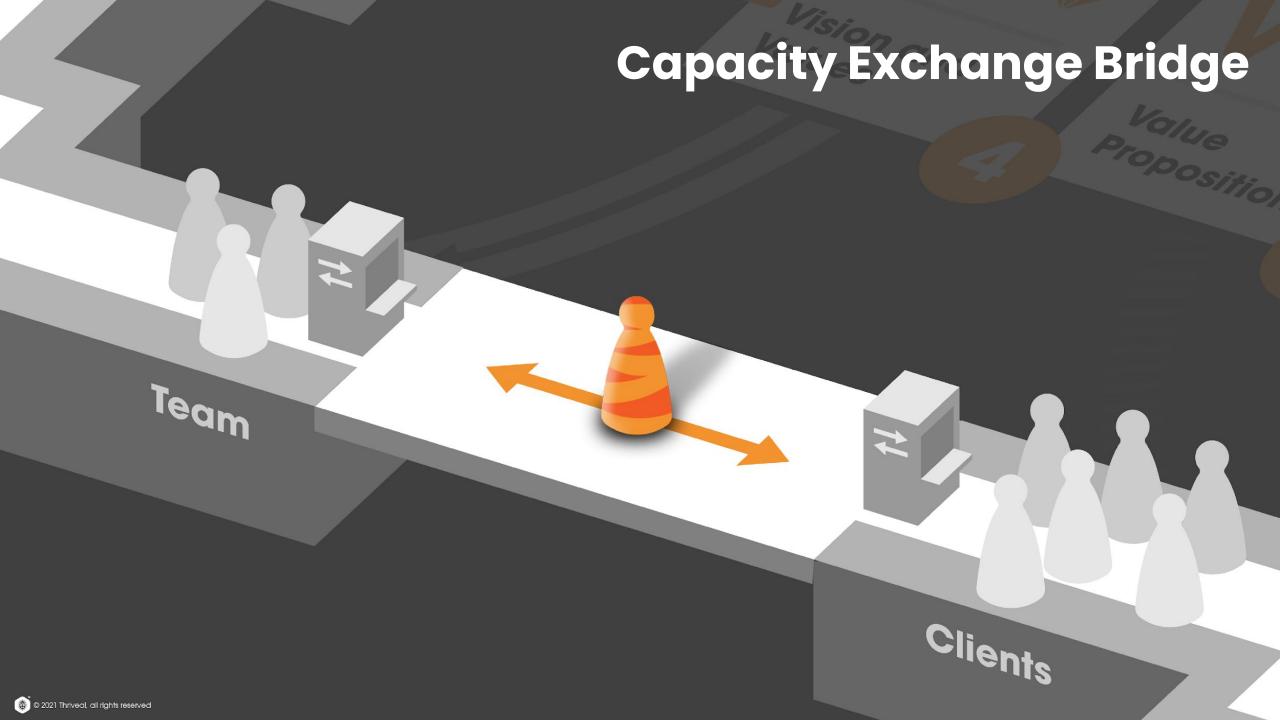


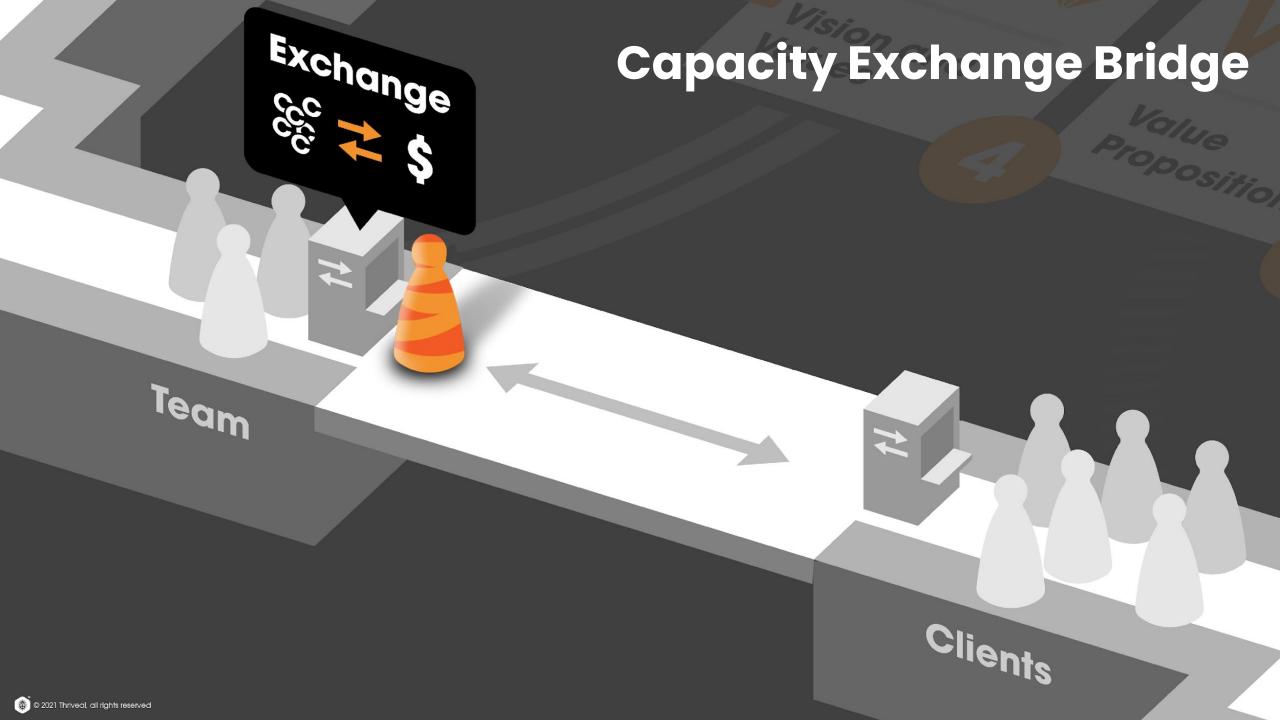
The Scaling 'L'

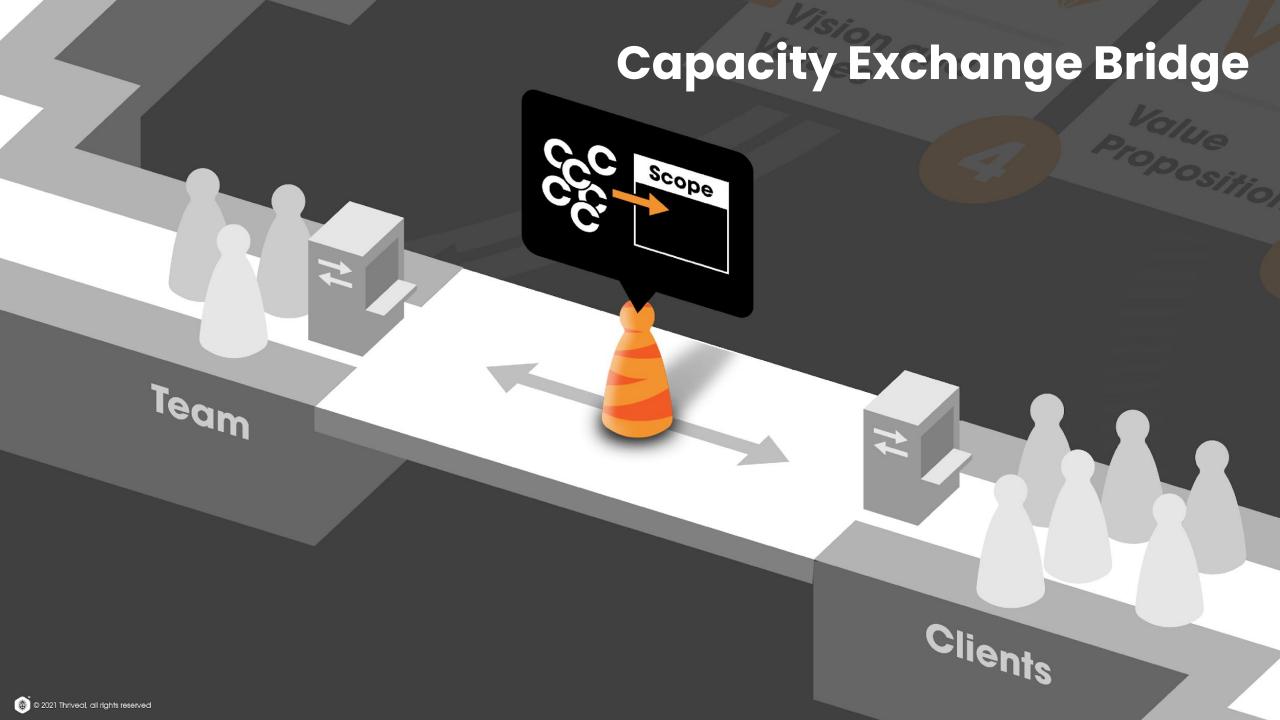


Scaling 'L' Considerations

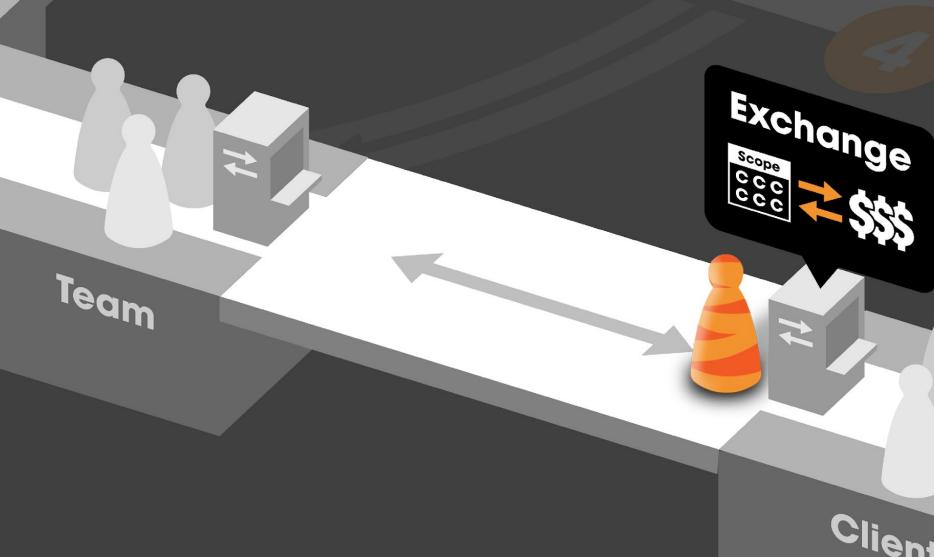
- The size of the Component 7 Revenue pipe matters
- Maturing systems must mature along with the speed and complexity of the revenue
- Maturing *teams* (humans) matter as they must mature along with the speed and complexity of the revenue
- The type of Revenue influences the type of Team Structure you build
- The cadence of the Revenue piping into the Team matters
- Missteps in balancing the scaling effects overwhelms the owner/leaders as they absorb all loose capacity



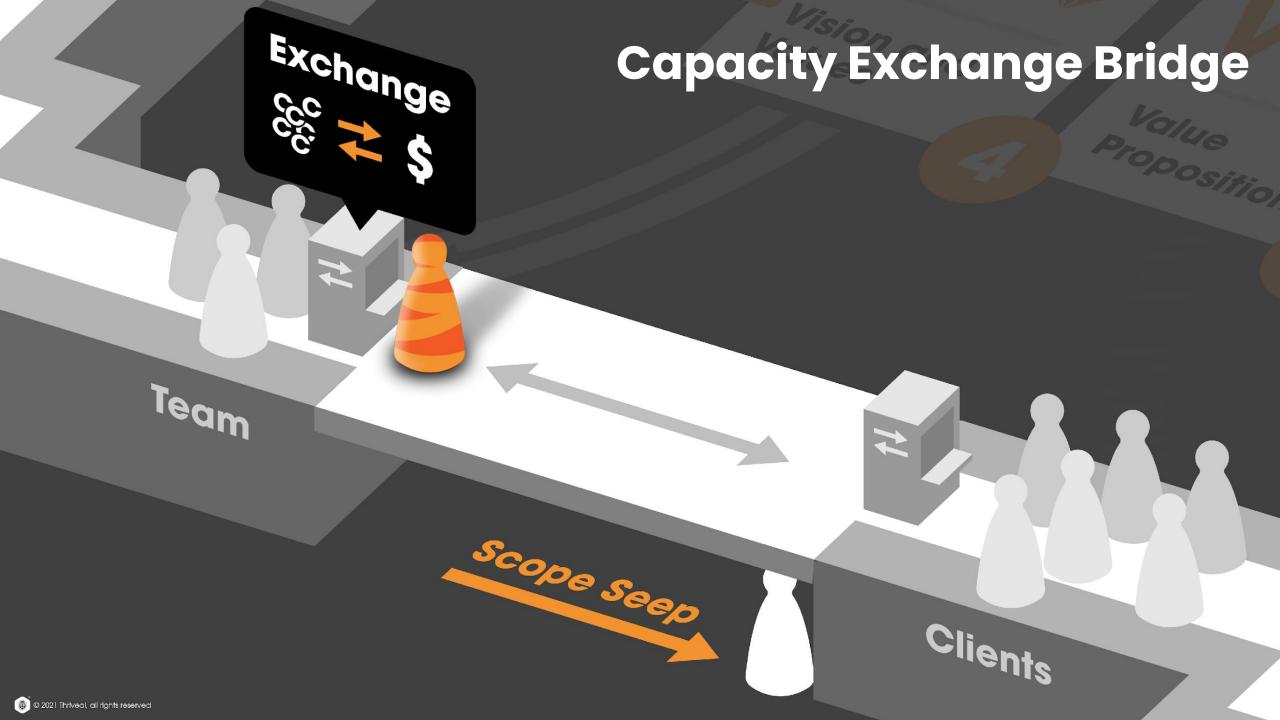




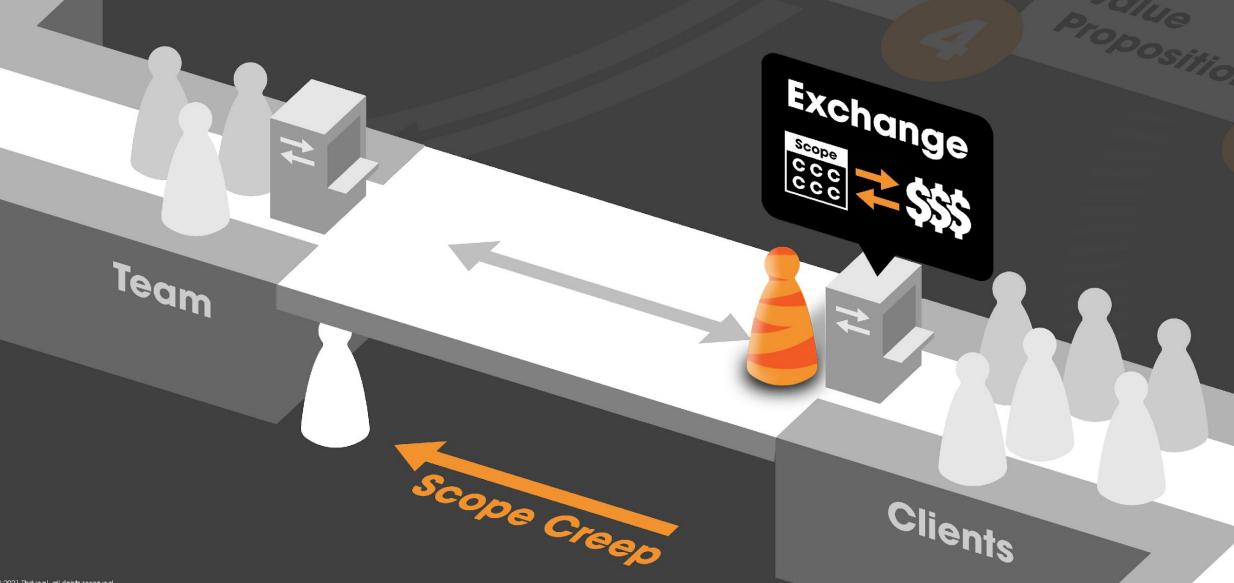
Capacity Exchange Bridge

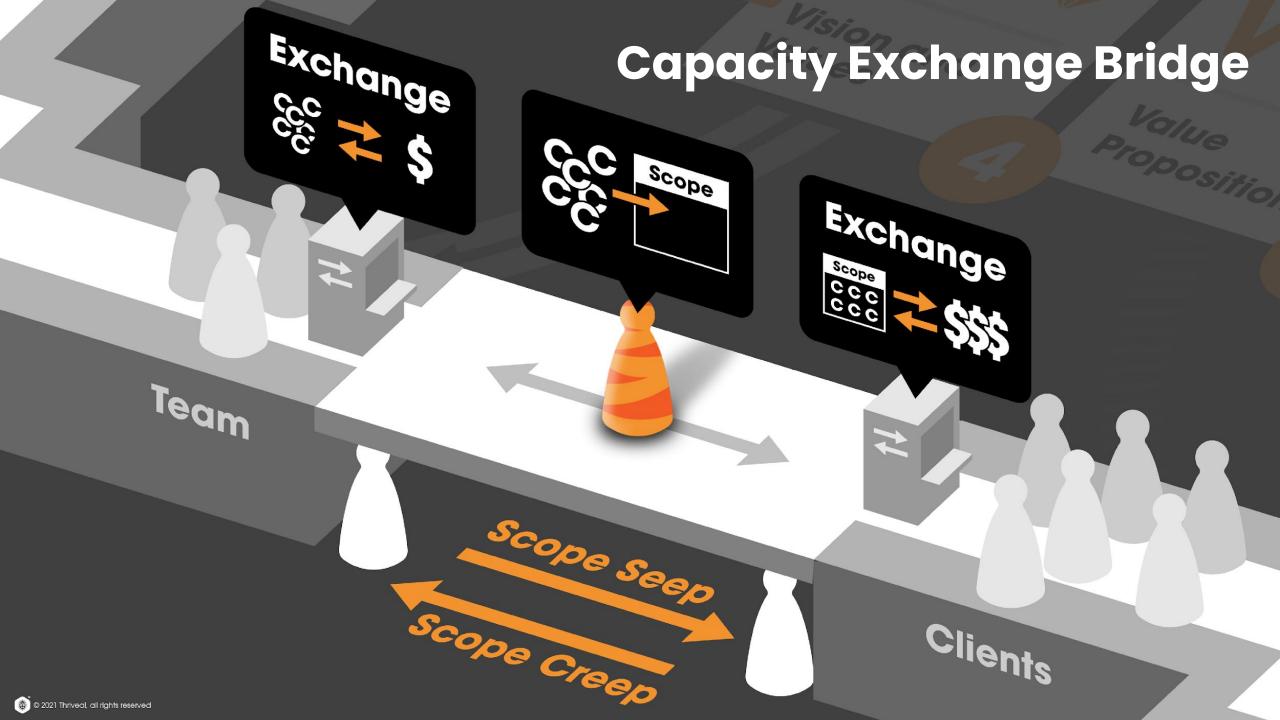






Capacity Exchange Bridge





Capacity Exchange Between the Components

[EXCHANGE PAY FOR CAPACITY]

EXCHANGE FORCES

Ongoing Leadership

Transactional
Specificity

Firm

Team

Capacity

(in the form of M.E.L.T.)

Money

(in the form of payroll)

Capacity

(in the form of scope)

Clients

Money

(in the form of revenue)

[EXCHANGE REVENUE FOR SCOPE]

CLARITY LEVERS

- Team Structure Capacity
 Chart
- Job Title & Description (w/ ranges of hours)
- Quarterly Convos with Team
- Project Management Huddles
- Project Management Software Tasks (w/ dates)
- Feedback Loops
- External/Internal Kickoffs
- Written Client Contracts

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Capacity Perspectives & Responsibilities for the Entrepreneur

PERSPECTIVES

RESPONSIBILITIES

Team

Keeper

"What must I give and keep in order to get paid?"

- Maintain consistent capacity output
- Work within scope
- Remain flexible and collaborative
- Abide by cultural core values

Firm

"What will we get from the the team in exchange for (more) money?"

Balancer

"What capacity and assignment do we have to make to receive our revenue?"

- Define team commitment responsibilities
- Maintain accountability around client scope
- Maintain accountability around team capacity
- Lead team in a safe and thoughtful culture

Clients

Consumer

"What can we get from the firm in exchange for giving them money?"

- Assume value and submit resulting price
- Maintain responsibilities within agreement
- Remain flexible and collaborative
- Consume value from firm consistently

Capacity Principles

- Taking in revenue and matching it with capacity always go together
 Team and the structures that allow for
- Team and the structures that allow for scaling mature slower than you can usually take in revenue
- usually take in revenue
 It is the responsibility of the firm owner to manage their team's capacity (accountability)
 Address capacity troubles with more
- Address capacity troubles with more clarity as a start

Thriveal Join the Thriveal community to grow with other firm owners:

To see all of the learning, community, and growth Thriveal offers, you can join the community for 6 months and get the first 2 months free!

Reach out for more info: info@thriveal.com

Q&A

karbonhq.com/resources/jason-blumer/

