



WOODARDTM

MEET JOE WOODARD

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Radically impact the way small businesses operate.

WOODARD™

INTRODUCTION

Vision, Mission & Purpose Statements

OUR VISION

To transform the way small business operates, working through small business advisors.

OUR MISSION

At Woodard we exist to do the following for small business advisors:

- Foster networking relationships
- Conduct the highest quality learning experiences
- Generate consulting opportunities
- Builds relevant, powerful resources

OUR PURPOSE

Every action we perform, Woodard is inspired by (and measured against) a simple but powerful purpose statement: "We empower small business advisors."

“For me the Woodard group has been an opportunity to meet new people, expand my knowledge and grow my business. In the monthly sessions we hold where I am learning about additional products. My interactions with my colleagues has provided me with resources so that I can refer clients/prospects for areas I don't cover and has helped my colleagues know me so that they refer business to me.”

Caren Schwartz

BIOGRAPHY



JOE WOODARD

As an author, consultant, Intuit contractor and national speaker, Joe has trained over 100,000 accounting professionals in the areas of practice development, changing technology trends, and how to maximize the use of QuickBooks in their accounting practices.

Joe regularly publishes articles for various publications and has been featured repeatedly in Insightful Accountant, Accounting Today, and AccountingWEB, in both articles and in video interviews.

Joe is CEO of Woodard Events, LLC, which delivers cutting-edge education, coaching, resources, and a community for small business advisors and small business owners within the accounting industry. In 2012, 2014, 2015, 2016, and 2017 Joe was recognized by Accounting Today as one of the Top 100 Influencers within the Accounting Profession. In 2008, Joe was recognized by CPA Practice Advisor as one of the top 40 up and coming thought leaders under the age of 40.

Joe engages with the next generation of accounting professionals with visits to Florida Atlantic University, Nova Southeastern University, and other Universities. In 2017, Woodard Events LLC, has partnered with the Latino community by the introduction of the first Spanish training track within their annual Scaling New Heights Conference.

WOODARDTM

EMPOWERING SMALL BUSINESS ADVISORS

Woodard is an integrated, accessible community of experts and small business advisors working together to scale new heights. Think of one person standing at the base of a mountain. They're geared up, highly experienced and ready to climb but, nonetheless, alone. At Woodard, we understand the power of strong professional networks and shared experiences. We connect small business advisors with their peers throughout the profession, helping them build their businesses by leveraging technology innovations, discovering and maximizing growth opportunities, and earning relevant certification training. And, we do all of this because we believe that advisors can make a radical impact on the clients they serve. Woodard does more than just train—we equip small business advisors (CPAs, EAs, bookkeepers, financial coaches and management consultants) with the skills, technology and relationships they need to thrive.

“With the Woodard Institute’s Gateway Course, I have been able to develop my vision for my company, to learn more about myself and my leadership style, to manage staff better, and best of all to learn how to manage my clients. I got so much more out of the course than I expected. Joe Woodard shared powerful content to make us better ProAdvisors and better people. I highly recommend this course. It is a game-changer.”

Woodard Institute Attendee

WOODARDTM

VALUE PROPOSITION

To Small Business Advisors



Woodard is an integrated, accessible community of experts and small business advisors working together to scale new heights. Think of one person standing at the base of a mountain, geared up, highly experienced and ready to climb but, nonetheless, alone. At Woodard, we understand the power of connected professional networks and shared experiences. We connect small business advisors with their peers throughout the profession, helping them reach new heights by leveraging the technology innovations, discovering and maximizing growth opportunities, and earning relevant certification training. And, we do all of this so advisors can make a radical impact on the clients they serve.

Woodard does more than just train —we equip small business advisors (CPAs, EAs, bookkeepers, financial coaches and management consultants) with the skills, technology and relationships they need to thrive.

“The Gateway Course has made me look at our practice and take a hard look at our vision, mission, and purpose as well as taking a hard look at myself. I am finally doing all my media profiles. I now have someone holding me accountable.”
Jeanne Reiser



PARTNERSHIPS

Unique Relationship with Intuit



Woodard Events is Intuit's preferred event management and training partner for training offered to accounting professionals. In this role, Woodard produces training at events like Intuit's virtual conferences, and the annual "Scaling New Heights®" conference for QuickBooks ProAdvisors.

Intuit also works very closely with Woodard Network to provide networking opportunities and training opportunities to certified QuickBooks ProAdvisors, and Intuit frequently collaborates with Woodard Consulting, seeking advice from Joe Woodard and his team on product development, training development, aspects of the ProAdvisor Program and Intuit's relationship with (and messaging to) accounting professionals.



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WOODARD™

PUBLICITY

For a complete list of articles, videos, excerpts, and audio, please see the Publications Tab on our webpage: woodard.com/press-room.



FEATURED IN: ACCOUNTING TODAY

Article: Scaling New Heights® 2016: Business Sense is Next to Godliness:

<http://www.accountingtoday.com/accounting-technology/news/scaling-new-heights-2016-business-sense-is-next-to-godliness-78184-1.html>

Video: Move Beyond the Technology:

<http://www.accountingtoday.com/video/video/move-beyond-the-technology-74473-1.html>

ACCOUNTINGWEB

Article: Joe Woodard's QuickBooks conference attendees are "Scaling New Heights":

<http://www.accountingweb.com/technology/accounting-software/joe-woodards-quickbooks-conference-attendees-are-scaling-new-heights>

Article: Intuit Looks at Technology's Role in Accounting's Future:

<http://www.accountingweb.com/technology/trends/intuit-looks-at-technologys-role-in-accountings-future>



INSIGHTFUL ACCOUNTANT

Article: What is an Epic Practice?:

<http://www.intuitiveaccountant.com/training-center/what-is-an-epic-practice/#.V1bln5MrJBx>

Article: Viewing a List of Adjustments When Adjusting by Both Account and Item in QuickBooks:

<http://www.intuitiveaccountant.com/general-ledger/viewing-a-list-of-adjustments-when-adjusting-by-both-account-in-quickbooks/#.V1bitZMrJBx>

Article: A QuickBooks ProAdvisor Reality TV Show:

<http://www.intuitiveaccountant.com/people-and-business/quickbooks-proadvisor-reality-tv-show/#.Vw5mtfkrJ9E>



PUBLICITY

Past Articles, Videos, and Audio



FEATURED IN: PROFIT FIRST PROFESSIONALS

Article: Grow My Accounting Practice Episode 1: Joe Woodard:

<http://www.profitfirstprofessionals.com/grow-my-accounting-practice-podcast/episode-1-joe-woodard>



CPA PRACTICE ADVISOR

Article: It's Time for A Small Business "Tech Makeover":

<http://www.cpapracticeadvisor.com/article/12176743/its-time-for-a-small-business-tech-makeover>



PRICING POWER

Article: #78 – Joe Woodard – Building an Epic Practice:

<https://pricingpower.net/joe-woodard/>



SAGE WORKS

Book Chapter: Next Level Accountants – Your Guide to Growing a Firm of Trusted Advisors SageWorks

Chapter written by Joe Woodard:

<http://web.sageworks.com/accounting/valuation/next-level-accountants/ebook/>

WOODARD™

SOCIAL PROFILES



TWITTER:

@ScalingNH
@joewoodard
@WoodardCompany
#snh18



LINKEDIN:

www.linkedin.com/company/woodard-company
www.linkedin.com/in/quickbooksadvisor



FACEBOOK

<https://www.facebook.com/scalingnewheights/>
<https://www.facebook.com/woodardgroup/>
<https://www.facebook.com/WoodardCompany1/>
<https://www.facebook.com/WoodardNetwork/>

IMAGES

HEADSHOT

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“Woodard Network is more than a group of accountants and consultants coming together for a common cause. It is a business catalyst. The combined experience of the members, along with guidance and mentoring from the trainers and leadership team, enable you to improve and grow your business. It’s a great investment!”

Marjorie Adams

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CMYK: Use for printed materials



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RGB: Use for website and all digital use



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