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# Venture Into the Foreign Market

Accounting & Finance Services for  
the North American Market –  
Practical Approach to Get Started

# Product

- Accounting – Record to Report
- Reporting – Statutory, Management, Visualization, Dashboards, etc.
- Operational Finance – Planning, Analysis, Budgeting, Forecasting, Feasibilities, etc.
- Corporate Finance – Debt/Equity Raises, Capital Structure, Bank Covenants, Investor Presentations, Business Models for Financing, M&A, etc.
- Business Strategy/Management Consulting
- Taxation
- Assurance / Internal Audit / Internal Controls
- Information Systems – ERP implementation, upgrades, consolidation, automation, etc.

• AI

# Market

- Accounting & Finance Services Market is huge ~ \$600B
- Top 10 Players have less than 1/4<sup>th</sup> market capture
- North American Share – 40%
- US GAAP, ASPE, IFRS
- QuickBooks, Sage, Zero, etc.

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# Personal Positioning

## Knowledge Worker

- Employment
- Entrepreneurship
- Hybrid
- Transition



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# Getting Started



# Initial Setup

- Professional Website & Email
- Professional LinkedIn Profile
- Professional LinkedIn Company Page
- Fiverr & Upwork Profiles, Pages & Gigs
- Capacity Provision for your Services
- Consider Incorporation

Estimated Cost: \$50 - \$500 one time + ~\$25-\$100/month for hosting/LinkedIn Premium, if needed.

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# Target Clients

## Small & Medium Sized Businesses

- Segment 1
  - 0-10 Employees
  - \$0-10M Revenue
- Segment 2
  - 10-50 Employees
  - \$10-50M Revenue
- Segment 3
  - 50-100 Employees
  - \$50-100M Revenue



The background of the slide is a photograph of a construction site at dusk or dawn. Several large tower cranes are visible, their silhouettes against a warm, orange-hued sky. In the foreground and midground, there are complex structures of scaffolding and rebar, indicating the early stages of a building's construction. The overall tone is industrial and professional.

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# Client Acquisition Basics

- Professionalism
- Quality of Work
- Confidentiality
- Timeliness & Reliability
- Under Promise & Over Deliver
- Innovation/Creativity/Enterprise



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# Client Acquisition Fiverr & Upwork

- Do not re-invent the wheel, take lead from the top-performing gigs in your domain
- Price, Options & Service – Optimize
- Start with competitive pricing
- Get 5-10 initial jobs & reviews from your existing network
- Promote your gigs across your social media presence
- Invest time in Learning Materials available on these platforms
- Be Patient and Persistent

The background of the slide features a dark gray network diagram. It consists of numerous small, light gray human-like icons, each enclosed in a circle. These icons are interconnected by a web of thin, light gray lines, creating a complex, interconnected pattern that symbolizes a social or professional network. The overall aesthetic is modern and tech-oriented.

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# Client Acquisition LinkedIn

## Lead Generation

- Search for Relevant People in Target Clients
- Set up a Messaging Campaign
- Be Transparent About Your Pitch
- Be Responsive
- Be Patient & Persistent

Cost: \$50 - \_\_\_\_ /month – Depending on your Growth Strategy




Saved Search: CEOs-Canada - SME X
☐ Select all
 Save to list
 Unsave
4K+ results
Show 389 new results

Company Personal

Connection	+
Geography	+
<div>Greater Toronto Area, Canada   X</div> <div>+ North America (6K+)</div>	
Industry	+
Years of experience	+
Connections of	+
Groups	+
First name	+
Last name	+
Profile language	+
TeamLink connections of	+
School	+

Workflow		
Lead lists		
People in CRM		
To enable filter, upgrade contract		
Persona		<b>New</b>
Account lists		
People you interacted with		
Saved leads and accounts		




Jean-Pierre Lacroix, R.G.D. · 2nd


President, Founder · Shikatani Lacroix Design  
Toronto, Ontario, Canada  
33 years 9 months in role | 33 years 9 months in company


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Save

About: With over three decades of experience in the branding and design industry, Jean-Pierre Lacroix is the president and founder of Shikatani Lacroix Design, an international design firm that specializes in creating immersive experiences that connect in the blink of an eye. He is also a registered graphic designer...see more


15 mutual connections


Shared groups


2 recent posts on LinkedIn






**Ashok Sharma** · 2nd




President - Renard Global Management

Toronto, Ontario, Canada

20 years 3 months in role | 20 years 3 months in company

About: I have extensive experience in all aspects of service excellence in the hospitality industry. I have researched customer experiences in some of the best hotels, clubs and restaurants in Europe, USA, Canada, MENA countries and in SE Asia. I have also mapped service excellence initiatives on ground services and...see more



 70 mutual connections
  Shared groups
  2 recent posts on LinkedIn



**Frank Nava** · 2nd  
 Chief Executive Officer · Metaverse Development  
 Greater Toronto Area, Canada  
 1 year 7 months in role | 1 year 7 months in company

About: As an experienced professional in the field of Metaverse architect, NFT marketplace development, and WEB3 engineering, I have a passion for pushing the boundaries of what's possible in the tech world. With a deep understanding of majority of business models, blockchain technology and a talent for crea...see more

3 mutual connections

 **Amy Wong** · 2nd   
Chief Executive Officer · Net Directives Inc.  
Toronto, Ontario, Canada  
13 years 8 months in role | 13 years 8 months in company

About: Client-Focused Provider of Creative Web Solutions & Innovative Internet Marketing, Fortune 500 strategies for small and medium size businesses. Our focus is helping our clients meet their online objectives using today's leading edge technologies. Specialties: - Video production and Development - Video ...see more

 5 mutual connections  Shared groups

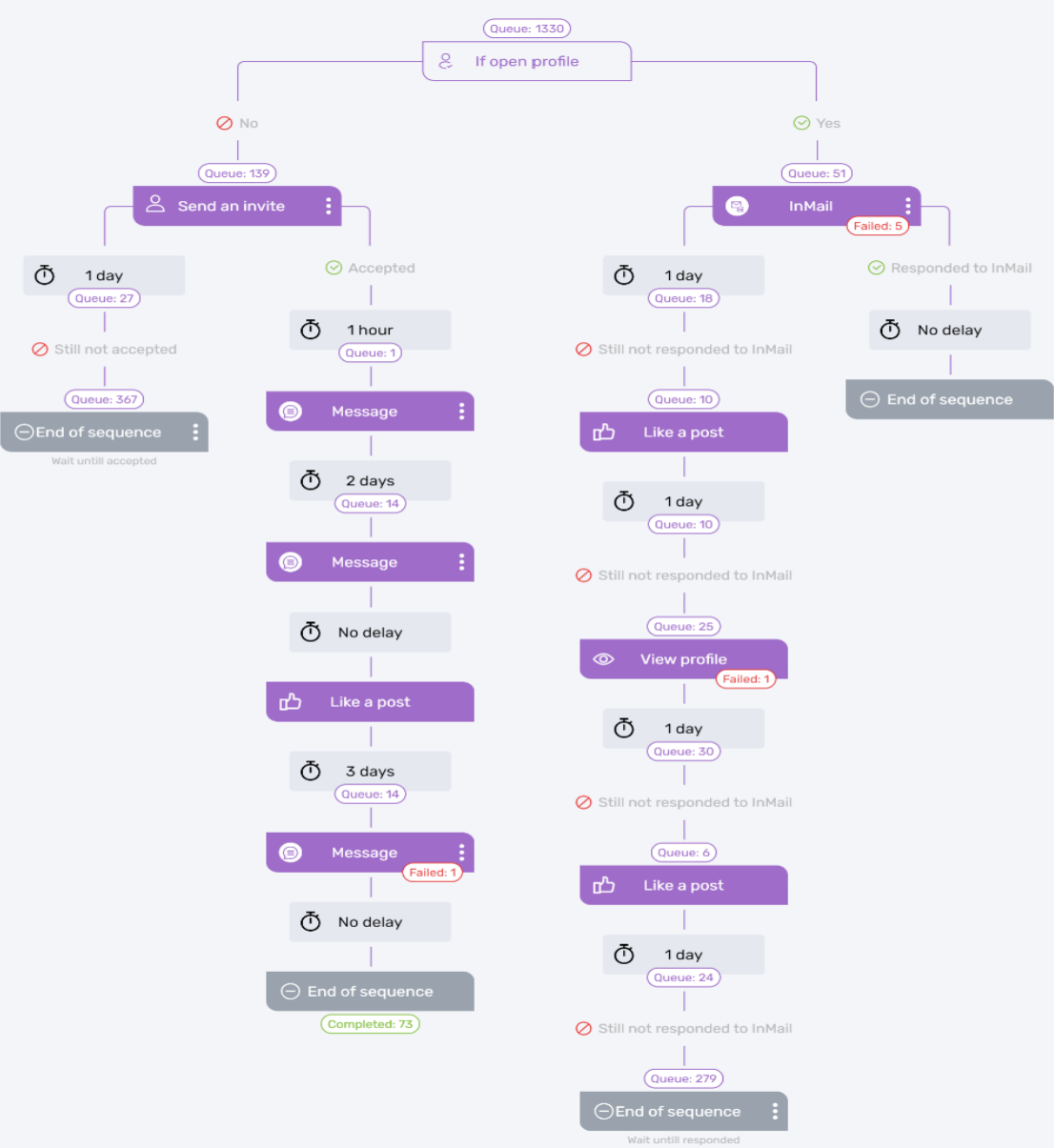
# Sample Campaign – Dripify.io, MeetAlfred, Copilot.ai, etc.

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Reset position

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Save as a template





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# Revenue Estimates

Wide Spectrum

Lower End

- Basic Bookkeeping:  
\$1,500 – \$24,000 annual for Startups & SMBs  
depending on workload  
[1-30 hours of work per week per client]

Higher End

- CFO Services  
\$450 - \$1,200 per day
- Funding / M&A  
% of Deal Value



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# Useless Distractions



- “AI will Replace Accounting (and other) Jobs”
- “Hamari Government Support Nahi Karti”
- “India bohat aage nikal gaya hai”
- “North American standards are difficult to meet”
- Complex vs Simple
- “Overnight” Success



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# Get Started!

Thank you :)