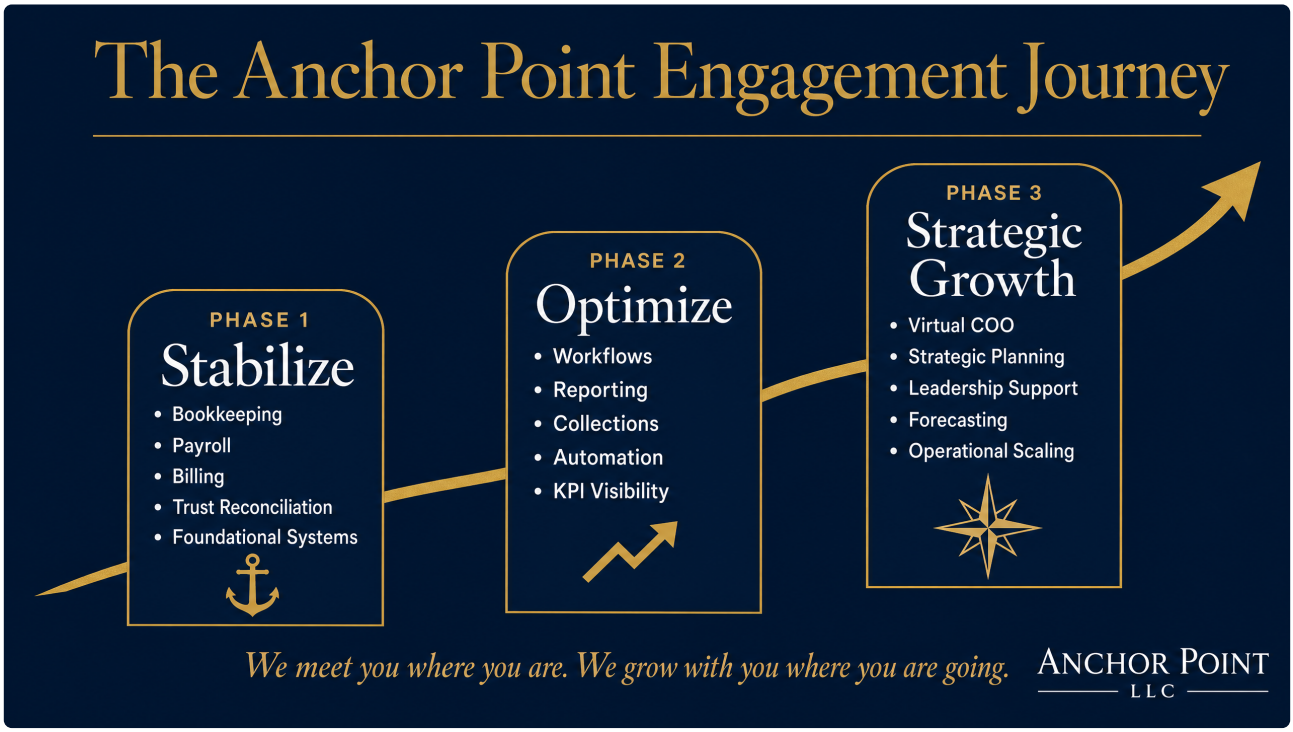
The Anchor Point Engagement Journey

Most accounting firms sell a fixed menu of services, forcing new law firms to either overpay for advisory support they aren't ready for, or settle for basic bookkeeping that provides no strategic value. At Anchor Point LLC, we believe that a true operational partner should meet you where you are—and grow with you where you are going.

We designed the **Phased Engagement Journey** specifically for early-stage and growing law firms. This model allows us to stabilize your foundation first, optimize your workflows second, and ultimately scale into a full Fractional CFO/COO relationship as your firm matures.



> *"You don't need a Fractional COO on day one. You need clean trust accounts and reliable payroll. But by year three, if your partner is still just balancing the books, your growth will stall. We built a model that scales alongside your firm."*

Phase 1: Stabilize

In the beginning, operational friction is the enemy of growth. The goal of Phase 1 is to establish a rock-solid foundation of compliance, accuracy, and reliability so that the founding partners can focus entirely on practicing law and generating revenue.

- **Bookkeeping & Accounting:** Clean, accurate, and timely financial records.
- **Payroll Processing:** Reliable, compliant payroll administration for your growing team.
- **Billing Operations:** Streamlined invoice generation to ensure consistent cash flow.
- **Trust Reconciliation:** Rigorous, compliant IOLTA/trust accounting to protect your license and reputation.
- **Foundational Systems:** Initial setup of your core financial tech stack (QBO, Clio, Ramp).

Phase 2: Optimize

Once the foundation is stable and the firm is generating consistent revenue, the focus shifts from compliance to efficiency. In Phase 2, we begin refining the operational engine to improve margins, accelerate cash collection, and provide leadership with clear visibility into the firm's performance.

- **Workflow Refinement:** Identifying bottlenecks in timekeeping, billing, and expense management.
- **Advanced Reporting:** Moving beyond the basic P&L to deliver custom management dashboards.
- **Collections Strategy:** Implementing systematic follow-up to improve realization rates.
- **Automation:** Integrating systems (e.g., Clio to QBO) to eliminate manual data entry.
- **KPI Visibility:** Tracking the metrics that matter: realization, utilization, and cost-per-acquisition.

Phase 3: Strategic Growth

As the firm matures, the challenges shift from operational efficiency to organizational design. In Phase 3, Anchor Point steps fully into the Fractional CFO/COO role. We use the financial data we've stabilized and optimized as the "visibility infrastructure" to help you lead, scale, and build a lasting institutional legacy.

- **Virtual COO Advisory:** High-level management consulting and organizational design.
- **Strategic Planning:** Multi-year financial modeling and growth roadmapping.
- **Leadership Support:** Implementing "The Mirror Test" and human-centered leadership frameworks.
- **Forecasting:** Cash flow projection, compensation modeling, and lateral hire analysis.
- **Operational Scaling:** Designing partnership readiness and succession frameworks (e.g., the Van Osdol model).

A Partnership Built on Trust

Our phased engagement model has built-in pricing tiers that scale only when you reach the next phase of maturity. This proves that we understand your current reality and are committed to your long-term success. We don't want to sell you services you don't need; we want to build the infrastructure that allows you to scale with intention.

Anchor Point LLC acts as a Fractional CFO and COO for law firms that demand excellence. To discuss which phase your firm is currently in, visit **anchorpointsolutions.com** or call **913.730.2450**.