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EXECUTIVE COACHING CASE STUDIES

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**THE CONSULTING CPA**

# BACKGROUND

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- I'm not an industry expert
- I don't have 30 years of experience
- I didn't go to an ivy leagues school and I don't have an MBA

Where I saw it first hand

What made it possible

Why your clients are looking for it

# CASE STUDY 1

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- Property investment business
- Always seeking funding (debt, preferred equity, equity)
- Billion \$ source of funding for all new deals
- Should he pursue it?

Why did he start the company?

What's does he want to do most: company building or deal building?

What will it mean to his culture?

What will it mean to his professional and personal life?

## CASE STUDY 2

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- Should I take the PPP loan funds

How certain are you of what will happen over the next 4 months?

When you applied what short term impacts were you envisioning?

Are you OK with other people knowing how much you got?

Will any competitors rub your nose in it or use it against you?

## CASE STUDY 3

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- Should I let this employee go after repeated outbursts

Is he in the right seat?

Does he deserve a spot on the bus?

How is he doing living out your values on the good days?

Are you willing to put up with the bad days?

Is he capable of changing?

# CASE STUDY 4

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- How should we respond to customers asking when I am going to retire?

What changes have customers seen over the last 5 years?

Are they concerned, worried, scared?

Why are they afraid of change?

Are you doing anything to address it now?

What else could you do?

What would you want to hear if you were in their shoes?

## CASE STUDY 5

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- Our bank turned off our ability to do ACH transfers for payroll customers

What short term options do we have (1-2 days)?

What do we need to see a week from now?

Who is doing what on your team?

Where should you station each person to avoid mistakes and think clearly?

What do you need to do in the next 2 hours, 4 hours, 8 hours, 24 hours?

# CASE STUDY 6

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- I'm not sure I have the right CFO

What do you need most from that role as the CEO?

Are you getting it and if not why not?

Explain the circumstances of his hire and how they have changed?

Is there a good time or a bad time to make a change?

How many other people feel the same way?

What kind of conversation do you need to have with him?



## CASE STUDY 7

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- Should I hire this consultant to help drive sales

Are his values consistent with yours?

Do you believe in his ability to generate the business?

How much is he asking?

How many sales would he have to generate to breakeven?

How many sales would he have to generate for you to be thrilled?

Again, do you think he can generate \_\_\_ of sales in the next \_\_\_ months?

## CASE STUDY 8

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- How do I work with my wife in the business?

What are the issues?

Who else is feeling them?

Does she enjoy it, have you asked her?

How did she get started in the business?

How is life different from back then?

How are you going to start this conversation with her?

When are you going to start it?

## CASE STUDY 9

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- Should I switch bankers (lawyers, accountants, engineers, suppliers, etc)

What are the issues?

How long have they been going on?

How many conversations have you had about them?

What's it like to do business with you?

What part of this can you own, and therefor change?

What is the next step and when will you take it?

# CASE STUDY 10

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- I think I want to sell my business?

How long have you been thinking that?

What happened, if anything, to stir it up?

What is your highest and best use?

How often are you doing things like that?

How much of this has to do with tasks/chores you don't like or aren't good at?

If you could script out the next 5 years of your personal life what would they look like?

## MOST IMPORTANT SKILL

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A. Listening so that...

B. You can ask the next question.

If you offer an opinion it will be in the last 5 minutes of the call

# LOGISTICS

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Zoom always works better for you but it may not for them.

Calls rarely need to be longer than 30 minutes.

“Soft” bi-weekly scheduling works pretty well.

Personal and professional goals keep you grounded on what matters.



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