

How Aimee LaLiberte helped Jenna Guarneri gain a *deep understanding* of her company's financials, *grow its profits* year over year, and create a solid roadmap to a *7-figure business*



“Every year we’ve grown because of Aimee, and every year we’ve been profitable because of Aimee. My goal is to be a 7-figure company by next year and with Aimee’s strategic planning the path to get there is very clear.”

Jenna Guarneri
jmgpublicrelations.com

When Jenna Guarneri hired Aimee LaLiberte to become her bookkeeper and virtual CFO back in 2018, she had reached the limit of her energy — and willingness — to continue handling her company’s finances on her own.

As the CEO of JMG Public Relations, a boutique PR firm that works with venture-backed startups, Jenna had seen some good growth in her first few years in business. Her client

roster was increasing and she had one full-time employee on staff.

Eager to deepen her knowledge of how to best manage her growing company’s financials, Jenna read the book *Profit First* by Mike Michalowicz. **She quickly recognized that the *Profit First* system could be the perfect way to be more strategic with the money her business was generating**, as well as help her

gain a better understanding of her company's financial picture overall.

She also recognized that it was time to hire a financial partner to help her do it.

"I wanted someone to help me understand Profit First better, as well as help me enforce it in my business," Jenna said. "I also needed an expert to help me really understand my numbers. **Our clients are all venture-backed startups who really know their financials, so it seemed only right that I really knew mine.**

"Also, as a small, boutique firm, **we needed to understand how to compete with the larger firms in the market,** and how to price out our services properly to scale and grow our company."

In the back of *Profit First*, Jenna found suggestions for Profit First professionals to work with, and Aimee was one of them. She reached out to her, and the two connected right away.

"From our very first conversation I knew Aimee was the partner I needed," Jenna said. "I felt really comfortable with her, and I knew that I could trust her. She talked about finance in a way that I understood."



Jenna said that after hiring Aimee, she quickly jumped in and began providing the strategy, organization, and optimization she'd been wanting for her business's financials.

That process unfolded in three parts. First, Aimee transitioned the company to a digital bookkeeping system that not only allowed them to track their revenue and expenses, but also included an archive where they could **clearly see their patterns of growth and make educated projections for the future.**

She also helped Jenna implement Profit First, establishing percentages for each of her Profit First accounts — including Income, Profit, Owner's

Pay, Taxes, and Operating Expenses — as well as providing guidance on **how to adjust those percentages as the company grew.**

Finally, Aimee provided a deep dive into the company's numbers, helping Jenna understand all of the finances that come with the business. Through monthly calls where they went through the company's profit and loss statements in-depth, **Aimee taught Jenna the key metrics to look at each month,** as well as how to analyze those metrics and compare them with past activity.

Understanding the past and current state of the company's financials allowed Jenna to make projections for the year, and **with Aimee's help, the two set financial goals and mapped out what needed to happen to reach them.**

Jenna said the impact of their work together has helped tremendously to prepare — and position — JMG Public Relations for continued growth.

“Our bookkeeping system helped us set up processes that made it easier for us to grow and add to our staff, which now is at five full-time employees,” Jenna said. “When we added a new accountant, the archive made it easy for them to get up to speed quickly. And when we needed to

start running payroll, we were able to easily integrate that as well.

“Aimee helped us determine the right people to hire and the right salaries to offer them. She's helped us make sure we're on track with our expenses and that we have a profitable business. She's created a system with processes that will easily evolve with the company's growth.”

Jenna said that an additional benefit of her work with Aimee has been the way her mindset toward money has changed.

“When I started working with Aimee, my mindset was kind of undefined,” Jenna said. “I wanted to learn how to be smart about money, how to plan ahead, what to plan ahead for, and how to be strategic about it.





“But Aimee is extremely smart in the way she thinks and talks about money. She makes it less about numbers and more about how money relates to your life and what you want to create. She’s shown me that when you shift your perspective and your relationship to money, you can change your dollars, too. It’s been really inspiring.”

Jenna and Aimee’s partnership has been going strong for three years now, and the results of their work have been significant.

“Every year we’ve grown because of Aimee, and every year we’ve been profitable because of Aimee,” Jenna said. “We’ve doubled this year in size and revenue over last year. We’ve put in a lot of great systems, and she’s helped us in every financial category, from profitability to cash flow to

payroll — everything. She just brings so much to the table and provides a lot of value and good direction.”

Jenna said that with Aimee’s continued guidance, she’s excited about soon reaching the next milestone in her business: her first 7-figure year.

“The goal is to be a 7-figure company by next year,” Jenna said. “And with Aimee’s strategic planning the path to get there is very clear.

“Back when I started out, I didn’t have the foggiest clue what I wanted or what we could do. I just wanted more business. **Now, we have a roadmap to seven figures and I know exactly what to do.”**

Jenna said that, along with the company’s growth and having this next milestone well within reach, she loves the confidence that working with Aimee has provided her as a business owner.

“Our work together has definitely made me more confident,” Jenna

said. “I didn’t go to school for finance and I didn’t know anything except the basics. Aimee helped me understand things I couldn’t have taught myself, and she helped me understand my numbers in a way that made sense to me.

“Every time I get off my monthly call with Aimee, I feel so great. We’ve grown and we’re making more money, and we’ve got this robust financial ecosystem. Our company is in a good place and it feels great to look back and see how much I’ve grown.”

Jenna said that every business owner could benefit from a partnership with Aimee, and that the investment will be well worth it.

“When you’re dealing with something as important as your finances, you need someone you can trust and someone who is going to be the best investment. Aimee is that person.

“She’s not the stereotypical bookkeeper who is dry and analytical. **She’s fun, she has great energy, and she also does great work.** She really gives me the courage to do what I need to do to continue to grow and improve.

“Aimee is a huge part of the business and I wouldn’t work with anyone else besides her.”

To learn more
about how
Aimee can help
you strategize,
organize, and
optimize the
financials in
your business,
click here.

