



Managing your firm with Apps

Jennifer Bauldic and Bob Wang

A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, and is wearing a dark jacket with a light-colored fur collar. The woman on the right is facing her, also in profile, and is wearing a light-colored top. The background is dark and out of focus, showing some green foliage. The text "Take a few moments to CONNECT with your neighbour" is overlaid on the right side of the image in a white, bold, sans-serif font.

**Take a few moments
to CONNECT with
your neighbour**

CPD Process

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- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
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Today's speaker



Jennifer Bauldic, CPB
President
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Managing your firm with Apps

**Selecting &
implementing Apps**

**Incentivizing your
team to use Apps**



Choose your Apps – But how?

24 Categories...

Hundreds of choices...





Task Dread

In the past...

Task Dread may have been delegated to an intern, family member or part-time employee.

- Menial
- Repetitive
- Boring



Today...

Task Dread goes to the machines... they never get tired.

- Work 24/7
- Accurate
- Low maintenance



“

In the beginner's mind there are many possibilities, but in the expert's there are few.”

Sōtō Zen monk and teacher Shunryu Suzuki

Stop over thinking. Just do one thing.

– Kellie Parks, Calmwaters

- Pick a task
- Schedule time
- Complete the research
- Choose the app
- Learn the App



App selection

PHASE 1

- ☐ Identify Task Dread

App selection

PHASE 2

☐ App Solution A

☐ App Solution B

☐ App Solution C

App selection

PHASE 3

- ☐ Reach out to Social Media
- ☐ Listen to other experiences
- ☐ Read reviews critically

App selection

PHASE 4

- ☐ Test Drive/ Demo App A
- ☐ Test Drive/ Demo App B
- ☐ Test Drive/ Demo App C

App selection

PHASE 5

- ☐ Select App Solution
- ☐ Implement to your firm
- ☐ **Learn to use it well**
- ☐ Implement for your customers

Repeat the process !!




Today's speaker



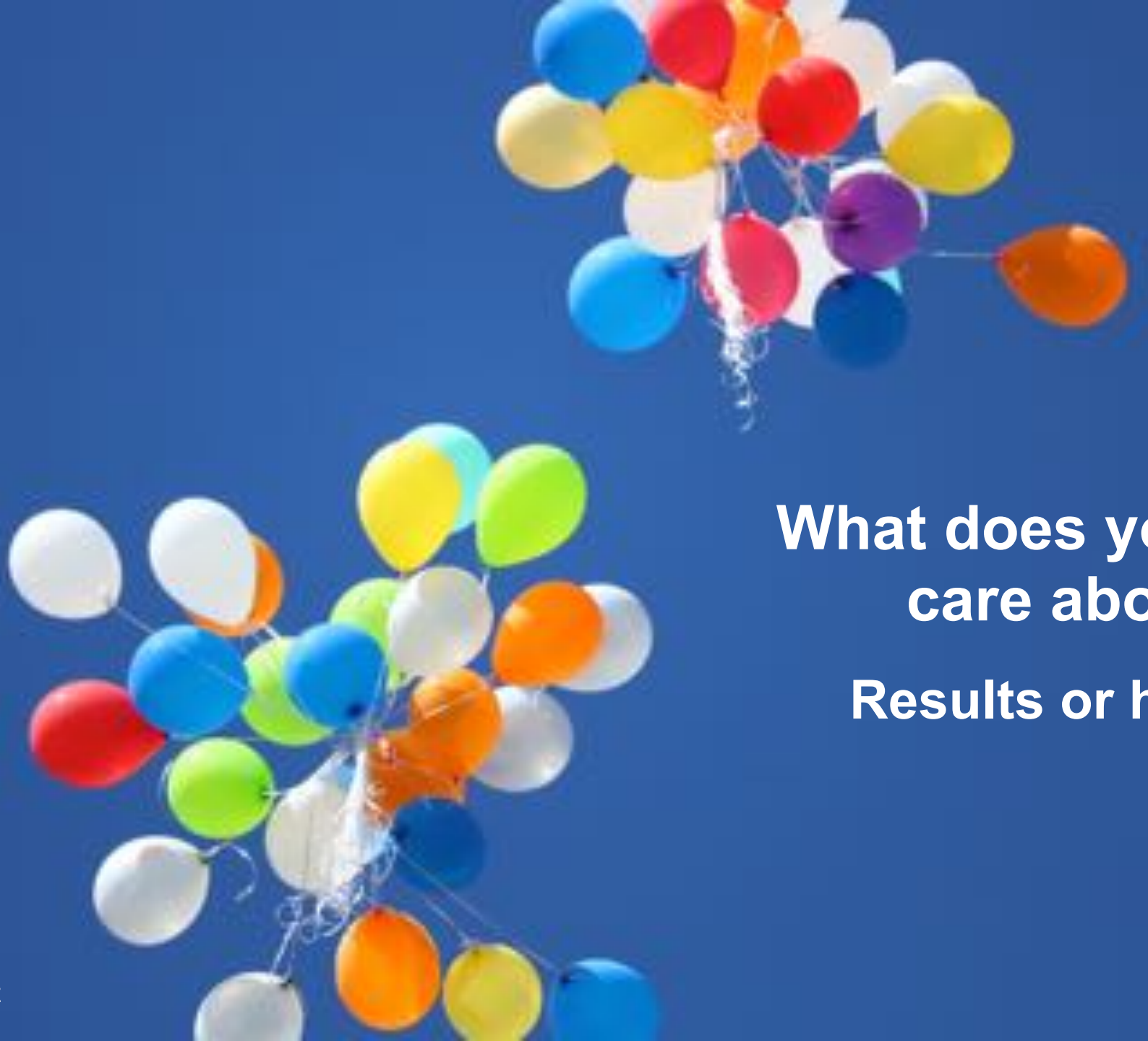
Bob Wang CPA, CA
CEO, Legacy Advantage
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Two bunches of colorful balloons are floating against a solid blue background. The top bunch is located in the upper right quadrant and includes balloons in shades of blue, yellow, red, white, and purple. The bottom bunch is in the lower left quadrant and features balloons in white, yellow, green, blue, orange, and red. Both bunches have white streamers trailing from their centers.

What do you care about?
Results or hours?


The image features two distinct bunches of balloons against a solid blue background. The upper bunch is located in the top right quadrant and includes balloons in shades of blue, yellow, red, white, and purple. The lower bunch is in the bottom left quadrant and features balloons in white, yellow, green, blue, orange, and red. Both bunches have white streamers trailing from their centers.

What do your clients about?
Results or hours?

Two bunches of colorful balloons are floating against a solid blue background. The bunch in the upper right contains balloons in shades of blue, yellow, red, white, and purple. The bunch in the lower left contains balloons in shades of white, yellow, green, blue, orange, and red. Both bunches have white streamers trailing from their centers.

**What does your staff
care about?**

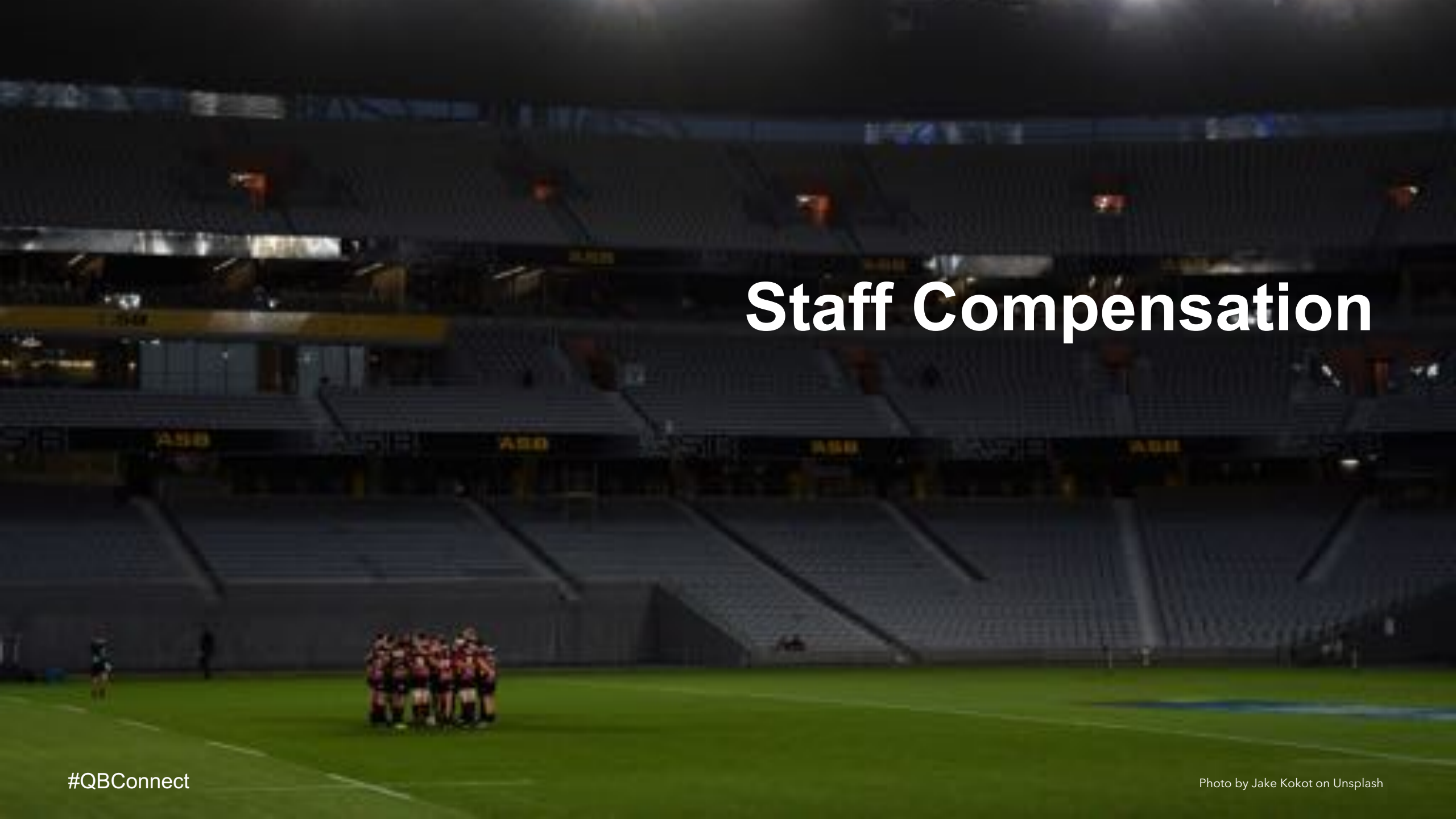
Results or hours?

The image features two clusters of colorful balloons against a solid blue background. The top cluster is located in the upper right quadrant and includes balloons in shades of blue, yellow, red, white, and purple. The bottom cluster is in the lower left quadrant and features balloons in white, yellow, green, blue, orange, and red. Both clusters have white streamers attached to them.

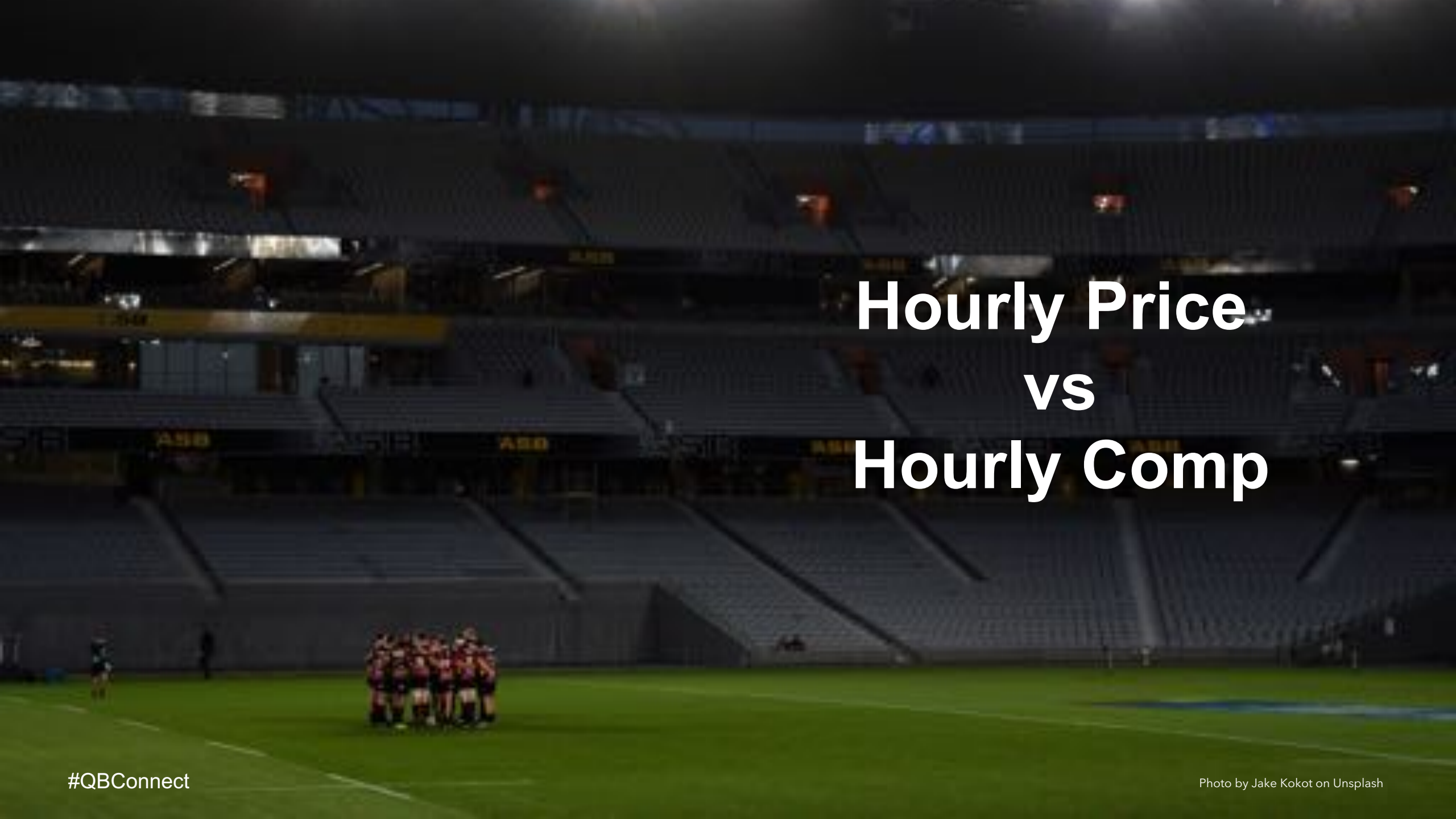
**If everyone cares about
results, then why are
we transacting based
on hours?**




Results Only Work Environment (ROWE)

A wide-angle photograph of a large, empty stadium at night. The stadium is filled with rows of grey seats, and the field is a vibrant green. In the center of the field, a group of football players in red and white uniforms are huddled together. The stadium lights are on, creating a bright glow against the dark sky. The text "Staff Compensation" is overlaid in white on the right side of the image.


Staff Compensation

A wide-angle photograph of a large, empty stadium at night. The stadium is filled with rows of grey seats, and the field is a vibrant green. In the lower center of the field, a group of football players in red and white uniforms are huddled together. The stadium lights are on, creating a bright glow against the dark sky. The text "Hourly Price vs Hourly Comp" is overlaid in white on the right side of the image.

Hourly Price vs Hourly Comp

A wide-angle photograph of a large, empty stadium at night. The stadium is filled with rows of grey seats, and the field is a vibrant green. In the lower center of the field, a group of football players in red and white uniforms are huddled together. The stadium lights are on, creating a bright glow against the dark sky. The text "Fixed Price vs Hourly Comp" is overlaid in white on the right side of the image.

Fixed Price vs Hourly Comp

A large, empty stadium at night, illuminated by bright lights. The stands are mostly empty, with some spectators visible. On the field, a group of football players in red and white kits are huddled together. The text "Fixed Price vs Variable Comp" is overlaid in white on the right side of the image.

Fixed Price vs Variable Comp

A wide-angle photograph of a large, empty stadium at night. The stadium is filled with rows of grey seats, and the field is illuminated by bright lights. In the center of the field, a group of football players in red and white uniforms are huddled together. The text "Quality Score" is overlaid in white on the right side of the image.

Quality Score

Legacy Advantage Compensation Model

Example



- Salary
- Variable
- Quality Score

A wide-angle photograph of a large, empty stadium at night. The stadium is filled with rows of grey seats, and the field is a vibrant green. In the center of the field, a group of football players in red and white uniforms are huddled together. The stadium lights are on, creating a bright glow against the dark sky. The text "Let's run through an Example w/ YOU!" is overlaid in white on the right side of the image.

**Let's run through an
Example w/ YOU!**

	Monthly Revenues	8,000.00	10,000.00	13,000.00
	Annual Revenues	96,000.00	120,000.00	156,000.00
	Commission	10%	15%	20%
Scenario 1	Base	40,000.00	40,000.00	40,000.00
	Commission	9,600.00	18,000.00	31,200.00
	Total Comp	49,600.00	58,000.00	71,200.00
	GM%	48%	52%	54%
Scenario 2	Base	30,000.00	30,000.00	30,000.00
	Commission	9,600.00	18,000.00	31,200.00
	Total Comp	39,600.00	48,000.00	61,200.00
	GM%	59%	60%	61%

Key Performance Indicators



What is KPI



How to pick a good KPI



What Matters to Legacy Advantage

Our KPI's



- Revenues / ee
- Quality Score
- # of Quotes sent & # of Leads
- MoM Growth in MRR
- GM%

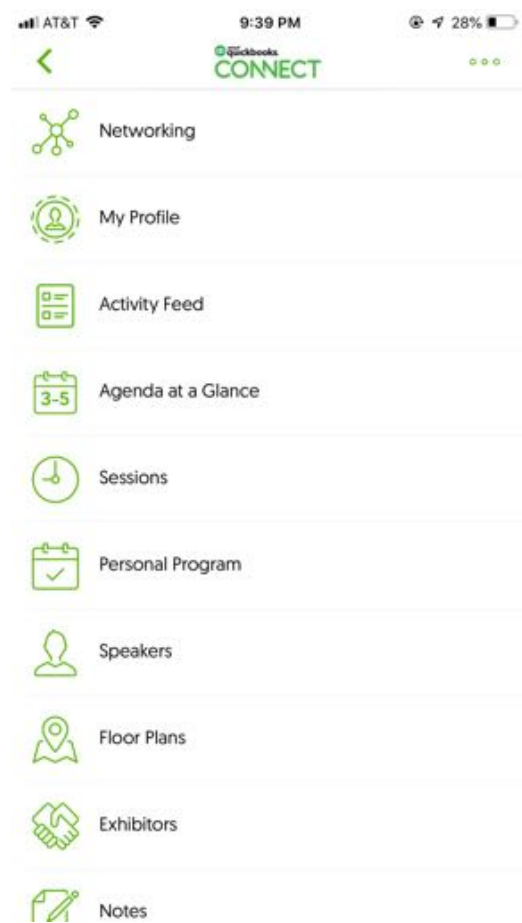
What KPI's do you track?



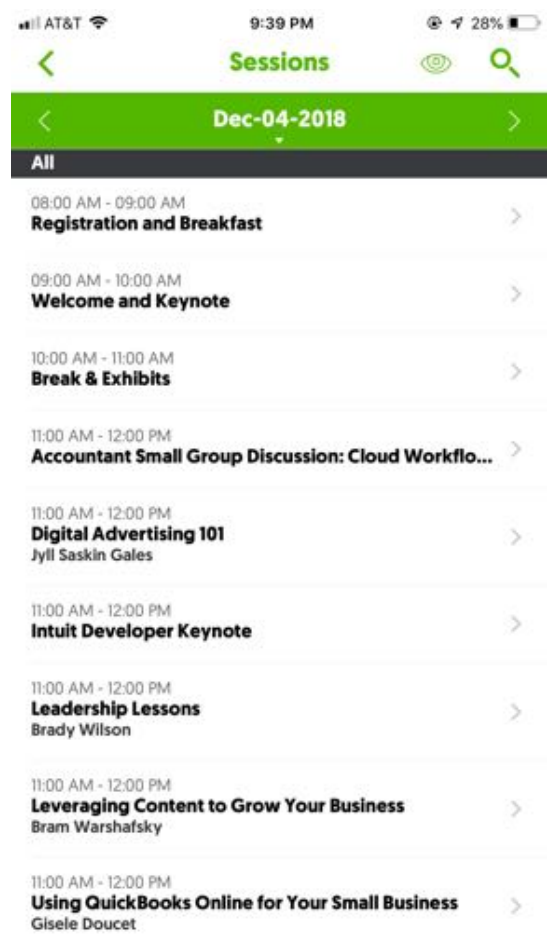
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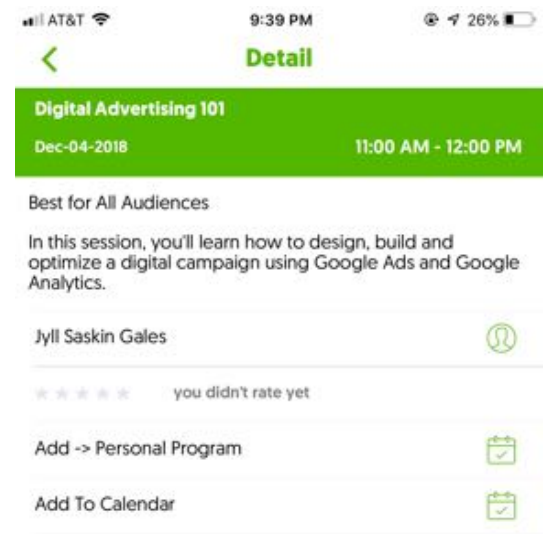
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	Accountant Small Group Discussion: Cloud Workflows	+
	Intuit Developer Keynote • session repeats	+

