




## Building a modern, agile and sustainable firm

Darren Root  
CEO - Rootworks

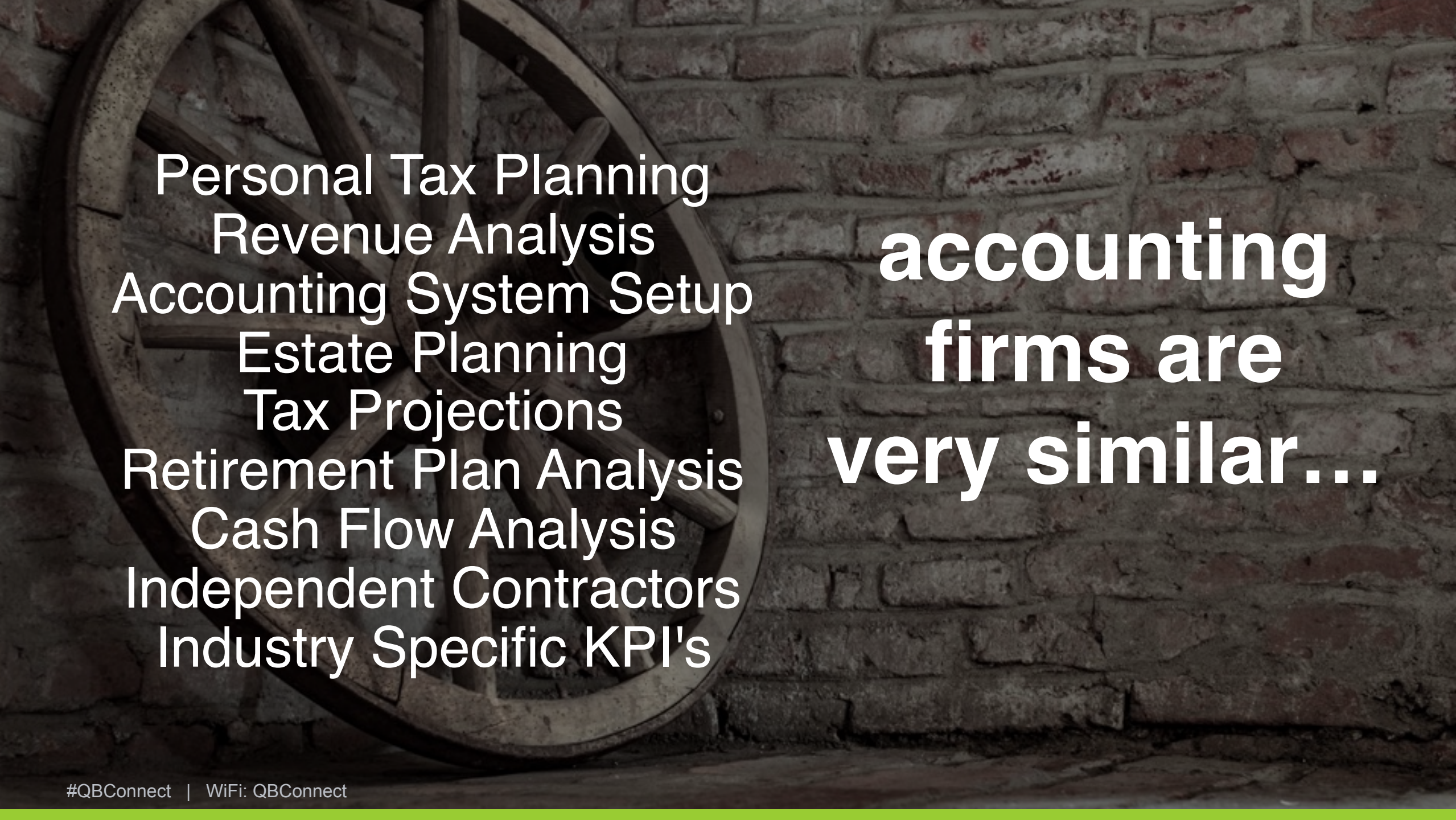


OWN  
THE  
FUTURE

A large, rustic wooden wheel with many spokes is leaning against a weathered brick wall. The wheel is made of dark wood and has a central hub with a circular opening. The brick wall is composed of reddish-brown bricks with visible mortar. The overall scene is dimly lit, giving it a vintage or historical feel.

**accounting  
firms are  
very similar...**




A large wooden wheel, possibly a water wheel or mill wheel, is leaning against a brick wall. The wheel has many spokes and a thick rim. The brick wall is made of reddish-brown bricks with some mortar visible. The overall scene is dimly lit, with the wheel and wall being the main subjects.

Personal Tax Planning  
Revenue Analysis  
Accounting System Setup  
Estate Planning  
Tax Projections  
Retirement Plan Analysis  
Cash Flow Analysis  
Independent Contractors  
Industry Specific KPI's

**accounting  
firms are  
very similar...**



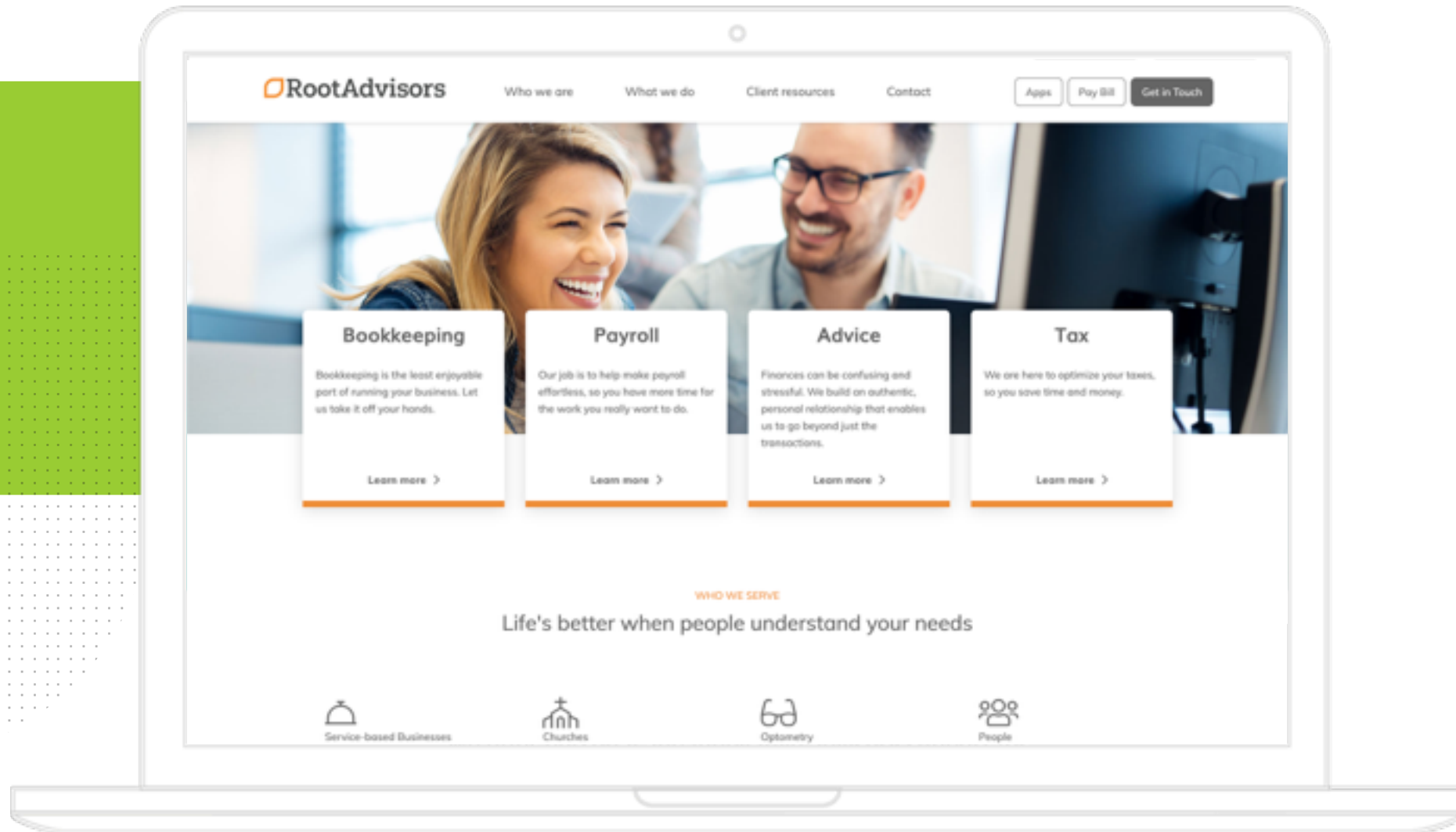


**Reinventing the  
wheel is painful...**

# Reinventing the wheel is **painful**...

- Employee empowerment
- Tools required
- Marketing
- Customer confusion

# What are you currently productizing?



# Reactive Service Model

# You run your business. We'll do your bookkeeping.

America's largest bookkeeping service for small businesses.

[Start Your Free Trial](#)

No credit card required.





[How It Works](#)[Pricing](#)[Tax](#)[FAQ](#)[Blog](#)[Sign In](#)

## Get Your Books Right With Pilot

Pilot takes care of your bookkeeping from start to finish so you can focus 100% on making your business succeed.

[Try It Risk Free](#)

# SCALEFACTOR

SCALEFACTOR

[Products](#) [Pricing](#) [Partners](#) [Resources](#) [Company](#) [Sign In](#) [Learn More](#)



## Put Your **Bookkeeping** On Autopilot

With ScaleFactor's smart finance software

[Learn More](#)

### WHO WE ARE

## How ScaleFactor Bookkeeping Works for You

ScaleFactor is the smart finance software that is changing the way modern businesses operate. By automating complex bookkeeping tasks and translating financial information into usable business insights, we are enabling business owners, managers, and entrepreneurs to focus on what they love: running and growing their business.



**KPMG**

Tour Pricing Blog Hub 1-855-777-7696 [Login](#) [Start now](#)

# KPMG Spark

All of your bookkeeping online.  
KPMG Spark is the online bookkeeping service designed for small business owners.

[Schedule a live demo](#)

Learn what KPMG Spark can do for your business.

Learn how KPMG Spark can help your business:  
[Find a time](#)

Write a reply... [@](#) [+](#) [✕](#)

The banner features a background image of a woman in a dark jacket looking at a tray of croissants in a bakery. The text is overlaid on the image. The navigation bar at the top includes the KPMG logo, links for Tour, Pricing, Blog Hub, a phone number (1-855-777-7696), and buttons for Login and Start now. A green button for 'Schedule a live demo' is positioned below the main text. A small white box on the right contains a link to 'Find a time'. At the bottom right, there is a 'Write a reply...' section with social media icons.





**Deloitte.**

Search

[About Deloitte](#) [Contact us](#) [Location: Australia](#) [Services](#) [Industries](#) [Careers](#)

**PrivateConnect**

[How it works](#) [Pricing](#) [About us](#) [Contact Us](#) [Log in](#)

## Outsource your finances to a Deloitte Trusted Adviser using Private Connect

Accounting, Bookkeeping, Tax and access to the best of Deloitte - we help Australia's most iconic private businesses and those who own them with their most complex problems.

Let us help you transform your finance operations from the implementation of cloud accounting software to the delivery of your tax, trust, company, partnership returns and automated reporting insights - we sit alongside, supporting your business needs as you grow.


Sign Up

A graphic consisting of three concentric circles. The innermost circle is blue, the middle ring is yellow, and the outermost ring is pink. The circles have a slight 3D effect with shadows.

A small, circular icon containing a downward-pointing arrow, centered below a horizontal line.



Locations Our People Events News Careers Blogs Contact Register Login

 SERVICES INDUSTRIES ISSUES & RESOURCES INSIGHTS ABOUT Search

**"Accountant or advisor?  
Actually, we're looking for both."**

People who know, know BDO.

LEARN MORE

SCROLL

**WHAT WE DO** SEE ALL SERVICES

**AUDIT & ASSURANCE**

In a rapidly evolving business and regulatory environment, the right guidance is more important than ever.

# Proactive Service Model



A hand in a dark suit points towards a complex network diagram. The diagram features a central globe-like structure with numerous intersecting lines and nodes. Four circular nodes are highlighted with concentric dashed lines. Each node is associated with a data visualization: a line graph and a bar chart. The labels for these are 'PRODUCT A' (top), 'PRODUCT D' (left), 'PRODUCT E' (bottom), and 'PRODUCT B' (right). The background is dark, and the overall theme is technology and data.

# Products + Data = Proactive Service

# Products

## Compliance

**Business**

**Personal**

## Advisory

**Business  
Foundation**

**Business  
Management**

**Business  
Succession**

**Personal  
Planning**



< Clients

...

Q Search Rootworks

12



Jordan Brewer ▾



# ABC Brewing Company

★★★★☆

Last Updated: 8/22/2019

Indianapolis, IN **S-Corp**

## PHONE

(317) 254-2999

## WEBSITE

[abcbrewing.co](http://abcbrewing.co)

## ADDRESS

W Tudor Ave  
Indianapolis, IN 46204

## Client Team



Overview

Details

Insights **2**

Opportunities

Projects

Products

Technology

+ Add

ARR

\$5,901.84

Top 5% highest earning clients.

Top Performing Products >

Audit Protection \$200/mo

Audit Protection \$200/mo

Audit Protection \$200/mo

Add a Buy/Sell Agreement

Client does not have a buy/sell agreement. Most businesses this size should have an agreement.

Dismiss

Add Health Insurance Offering

Penalties may apply to employers with 50+

Top Opportunities >

Audit Protection Service \$200/mo Mark Closed ▾

Financial Planning Service \$200/mo Mark Closed ▾

Payroll - Quarterly/Annual Reporting Service \$200/mo Mark Closed ▾

Tasks >

☐ Audit technology information Due Yesterday

☐ Check in with client advisory board Due Tomorrow

☐ Follow up on company details Due 9/23

☐ Follow up on 2020 Tax service Due 9/23

☐ Follow up on new product offering Due 9/23





[< Clients](#)

...

12



Jordan Brewer ▾



Made in InVision

# ABC Brewing Company

★★★★☆

Last Updated: 8/22/2019

Indianapolis, IN S-Corp**PHONE**

(317) 254-2999

**WEBSITE**[abcbrewing.co](http://abcbrewing.co)**ADDRESS**W Tudor Ave  
Indianapolis, IN 46204**Client Team**

Overview

Details

Insights 2

Opportunities

Projects

Products

Technology

+ Add**Advisors** ...

Investment Advisor

Herman Maldonado

Attorney

Jerome Burns

Industry Consultant

Lelia Jensen

Insurance Agent

Dylan Newton

**General** ...

Entity Type

S-Corp

Buy/Sell Agreement

No

Client Budgets

Yes

Foreign Bank Accounts

Yes

**Shareholders** ...

Shareholder Salary

\$50,000

Shareholder Distributions

\$100,000

Officer Paid Health Insurance

Yes

**Employee** ...

Retirement Plan

401(k)

Employee Handbook

No

Employed Spouse

-

Employed Minors

Yes

Independant Contractors

No





Search Rootworks

12



Jordan Brewer



Dashboard



Clients



Prospects



Opportunities



Projects



Community



Membership



Help



Settings



Made in InVision

+ Add Client

Export



CLIENT

STATUS

ARR

INDUSTRY

LOCATION

OPPORTUNITIES



Administaff, Inc.

Active

\$650.24

Restaurants

Etna Green, IN

4 Opportunities



Advantica Restaurant Group, Inc.

Active

\$142.45

Hospitality

Brook, IN



AGCO Corporation

Active

\$356.72

Churches

Kirklin, IN

4 Opportunities



Adolph Coors Company

Active

\$1,332.43

Optometry

Boswell, IN



Aetna Inc.

Active

\$1,332.43

Retail

Brooksbury, IN



Agway Inc.

Active

\$1,332.43

Healthcare

Hidden Valley, IN

3 Opportunities



Advanced Micro Devices, Inc.

Active

\$5,901.84

Automotive Dealers

Amo, IN



AFLAC Incorporated

Active

\$5,776.32

Daycare Centers

Clayton, IN



Air Products and Chemicals, Inc.

Active

\$10,003.92

Hospitality

Brownstown, IN



Adobe Systems Incorporated

Active

\$10,003.92

Fitness Clubs

Cromwell, IN

4 Opportunities





Search Rootworks

12



Jordan Brewer



Saved Filters



+ Filter

+ Filter Group



Made in InVision

+ Add Client

Export



CLIENT

STATUS

ARR

INDUSTRY

LOCATION

OPPORTUNITIES



Administaff, Inc.

Active

\$650.24

Restaurants

Etna Green, IN

4 Opportunities



Advantica Restaurant Group, Inc.

Active

\$142.45

Hospitality

Brook, IN



AGCO Corporation

Active

\$356.72

Churches

Kirklin, IN

4 Opportunities



Adolph Coors Company

Active

\$1,332.43

Churches

Boswell, IN



Aetna Inc.

Active

\$1,332.43

Retail

Brooksbury, IN



Agway Inc.

Active

\$1,332.43

Healthcare

Hidden Valley, IN

3 Opportunities



Advanced Micro Devices, Inc.

Active

\$5,901.84

Automotive Dealers

Amo, IN



AFLAC Incorporated

Active

\$5,776.32

Daycare Centers

Clayton, IN



Air Products and Chemicals, Inc.

Active

\$10,003.92

Hospitality

Brownstown, IN



Adobe Systems Incorporated

Active

\$10,003.92

Fitness Clubs

Cromwell, IN

4 Opportunities



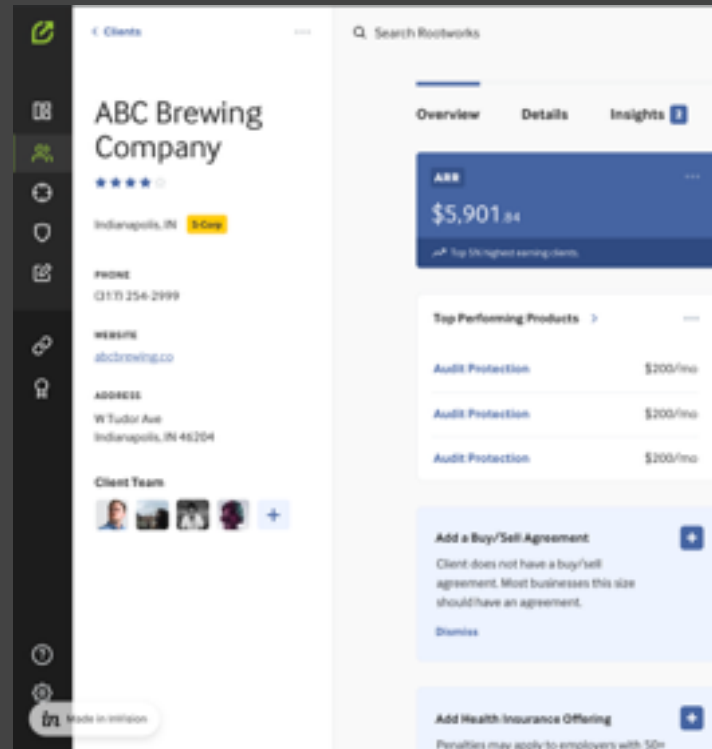


# Data Mindset

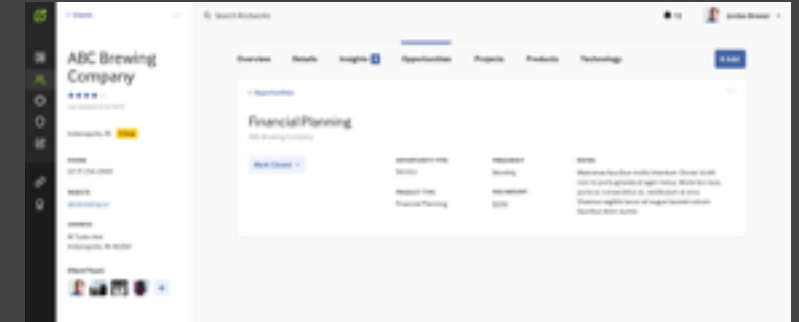
**The power of data is about  
Making customer's lives better.**



Product Idea



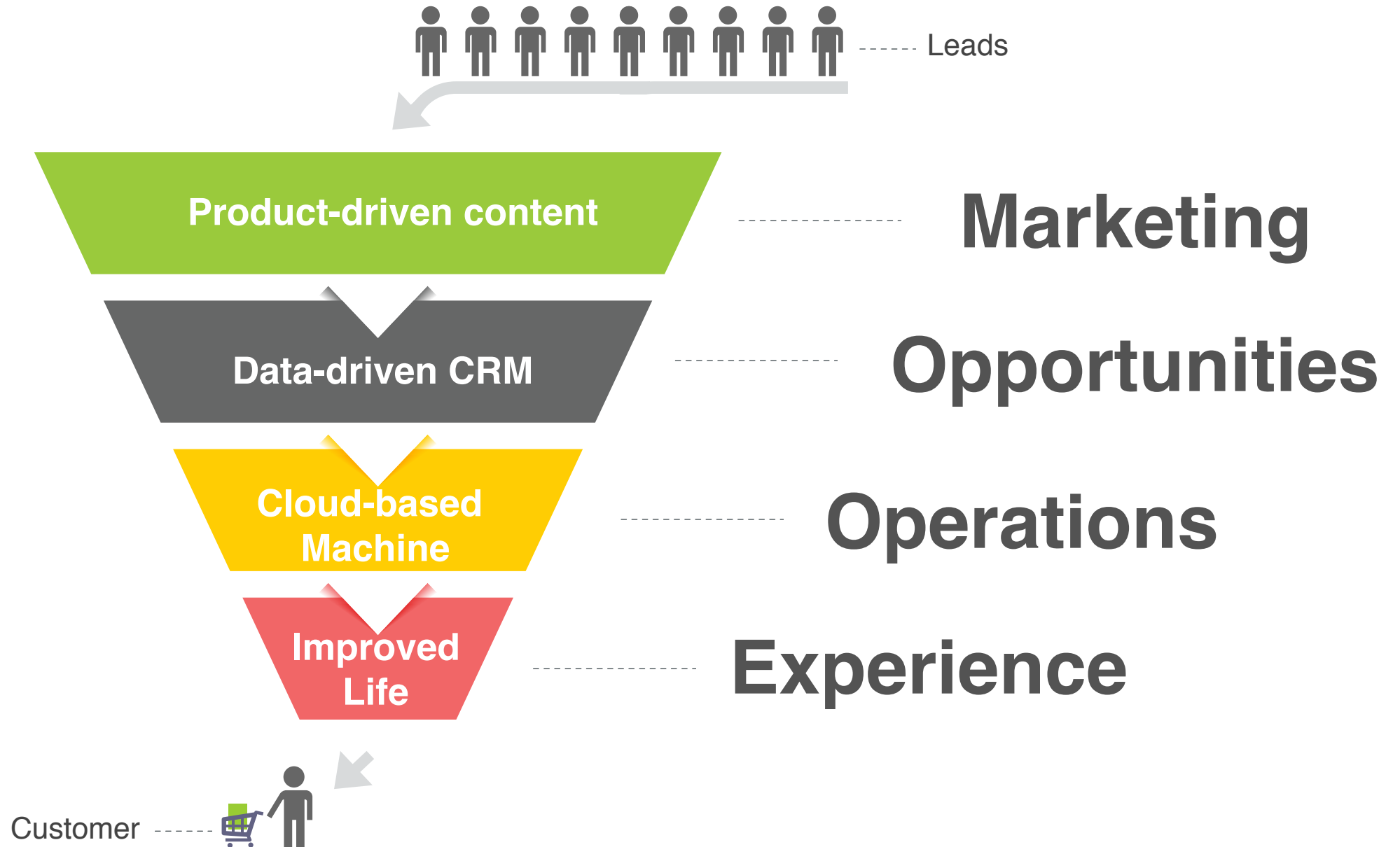
CRM Data



Returning customer opportunities



New customer prospects





# Clarity | Platform | Relationships

# Relationships

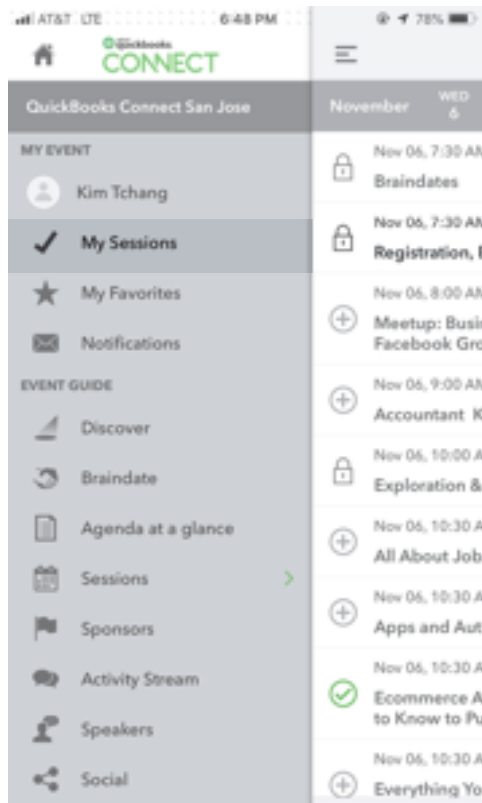


# Questions?

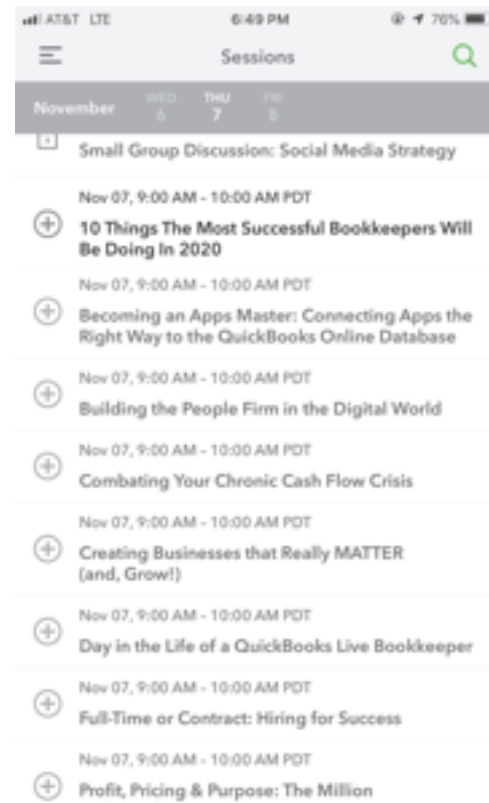
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

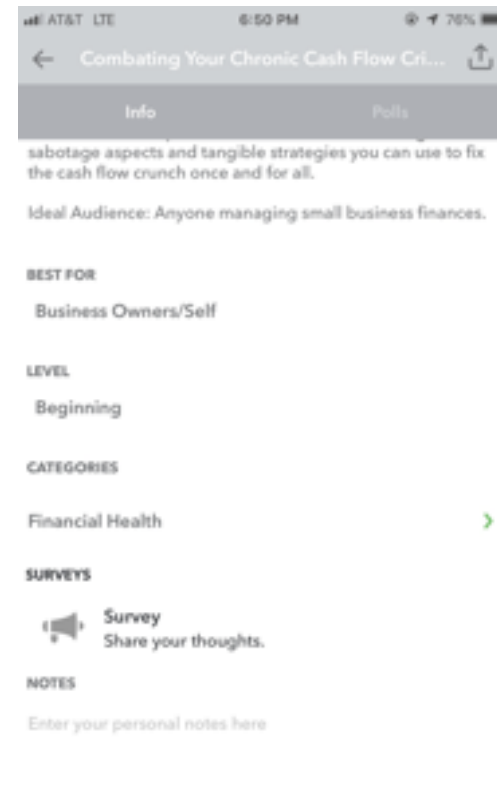
## 1. Select Sessions



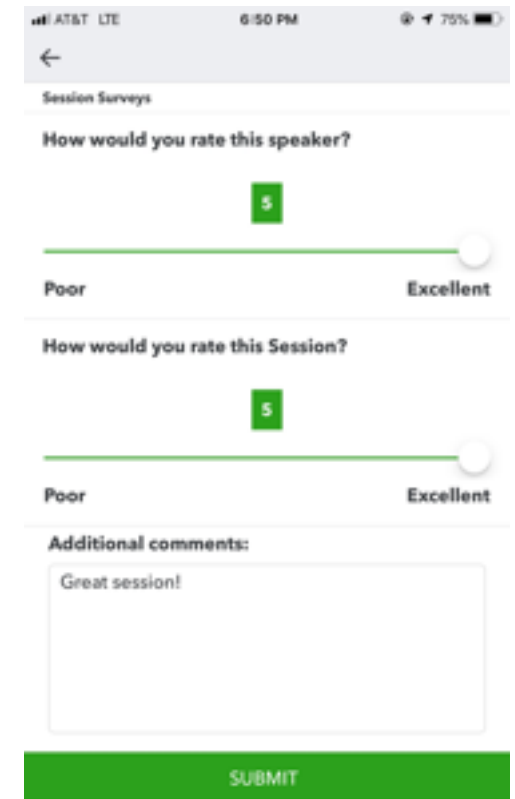
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings





# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda for November 7, which is the 'Accountant Day'. The page features a navigation bar with links for 'Why Attend', 'Agenda' (highlighted), 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is in the top right. Below the navigation bar, there are tabs for 'November 6 Accountant Day', 'November 7' (selected), and 'November 8'. A 'Print Agenda' link is on the right. The main content area includes a search bar labeled 'Search for sessions' and a filter section with categories: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. An 'Expand all +' link is also present. The agenda list shows sessions for November 7:

- 7:30-9:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: **Braindates** (marked with an 'x'). Description: 'New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more.](#)' Best for: All Audiences. CPE Hours: not eligible.
- 8:00-8:30 am: Yoga (marked with a '+')
- 8:00-8:45 am: **Breakout Sessions**
- Small Business Meetup: Relationship Marketing and the Power of Human Connection (marked with a '+')
- Small Group Discussion: Social Media Strategy (marked with a '+')
- Small Group Discussion: Showing up - Why What You Wear Matters (marked with a '+')
- Small Group Discussion: Build Your Dream Bookkeeping firm (marked with a '+')



OWN  
THE  
FUTURE