



Actual Use Cases from Accounting & Financial Firms Like Yours





TL;DR

- 1. Automatic Lead Qualification for Tax Advisory Firm**
- 2. Streamlined Amazon & QuickBooks Reconciliation for Outsourced CFO Firm**
- 3. Instant Task Creation for New & Existing Clients**
- 4. Automated Sales Tax Journal Entry for CPA Firm**
- 5. Full-Client-Picture CRM Implementation for Financial Planning Firm**
- 6. Tax Revenue Reporting for**
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Automatic Lead Qualification for Tax Advisory Firm

A 10-person tax advisory firm that serves medical professionals felt the need to stop taking calls from every prospect. They started automatically qualifying potential clients given many of them couldn't afford their services.

We helped them create and integrate a qualification form that asks for more context, in anticipation of the discovery call.

Most importantly:

- Prospects with revenue below \$400k were redirected to a resources page & added to their newsletter.
- Prospects with revenue above \$400k were redirected to a Calendly page to book a call

This not only helped them avoid wasteful conversations that don't lead to revenue, but made the conversation with qualified prospects much more productive.

Streamlined Amazon & QuickBooks Reconciliation for Outsourced CFO Firm

Mod Ventures, an outsourced accounting & CFO services firm, was spending 3 hours of precious time reconciling the account of an Amazon seller client.

Despite the client using A2X, Adam, a fractional CFO in the team, still found himself having to find discrepancies between the lists of orders from Amazon – and the daily summaries posted on Quickbooks.

We helped them create an automation that:

1. Takes the Amazon sales
2. Takes the QuickBooks entries for the period
3. Finds all matches
4. While also listing the non-matched transactions (for their team to investigate)

This cut the process from 3 hours to 15 minutes, allowing their expert team to spend time in higher-value activities.

“It went exactly as planned! I had no issues. It saved me at least 3 hours. I only expect this to increase in future months as I become more familiar with the process and reading the reconciliation reports.”

Instant Task Creation for New & Existing Clients (Ignition-ClickUp Integration)

My Franchise CPAs is a full-service accounting and tax firm servicing franchisees nation-wide.

John Mollica, one of two founding partners, was sending quotes via email – and once the client accepted, had to remember to create and assign all those tasks to the team.

Some tasks were falling through the cracks, and this led to dissatisfied customers.

With our expertise and recommendations, we helped them:

- Implement Ignition as their proposal management system
- Optimize their ClickUp instance
- Match line items to tasks for every deliverable needed

Now, every proposal accepted instantly creates tasks for each deliverable.

Also, such tasks come with a template – a default list of steps, descriptions, time estimate, and assignee.

I'll let you John tell the benefit in his own words:

“This is huge. I now know that what I promised on the sale will never fall through the cracks – because every task is being transferred directly to the right place and to the right person, immediately.”

Automated Sales Tax Journal Entry for CPA Firm

Donna Bordeaux is a highly tech-savvy CPA, owner of Calculated Moves and member of Jason Staats' Realize community.

While automating many of the routine tasks of month-end close, she had her team find sales tax amounts for certain POS systems. However, she still needed to manually create these journal entries within each client Xero account.

Although she came to us with a good portion of her idea completed, we consulted with her to:

- Optimize her Airtable structure - and include the values needed to make the automation apply to all clients
- Create the Make.com automation to transfer over these entries to Xero
- Test and validate within Xero to ensure everything works as expected

You can see a video testimonial from Donna [here](#), but here are the highlights:

“These automations help us **save a lot of time and headache of busy work** that we can automate and not have to worry about doing as part of our month end process.

Isaac and his team at Opzer were very prompt and courteous and **did a fabulous job!** I had a great experience. Highly recommend!”

Full-Client-Picture CRM Implementation for Financial Planning Firm

Pioneer Wealth Management came to us after being quoted \$50,000 to automate many CRM actions they perform pre-sale to get a client.

They had no direct way to know how many active clients they had at any given time, which they needed for regulatory purposes.

Their goal was to create a full picture of the client within their CRM of choice (Wealthbox) while also enabling their team to spend as little as possible keeping track of clients and creating proposals.

We helped them:

- Sync calendar bookings (from Calendly) to their CRM
- Create & link their cloud folder (Box) associated with the client
- Auto-populate client data into their PandaDoc proposals once the client is ready
- Update the CRM once the proposal is accepted
- And so much more

For a fraction of the cost (and time), the Pioneer team got everything they wanted – and now they benefit from full transparency on client history, as well as the ability to invest more time advising clients on their wealth.

"I was surprised about how much progress we made in the first few weeks.

Automating some of these repetitive tasks so that people don't have to remember... that's been an aha moment for me"

I've gotten kudos for taking the lead on getting this done. And it's only taken an hour a week of my time, maybe a little less."

Tax Revenue Reporting for Mid-Size Firm

We engaged with a mid-sized tax & audit firm with over 50 employees.

Among many items on their wishlist, they wanted the ability to report their tax revenue by senior, by manager, and by preparer – presumably for compensation purposes.

They had custom fields that represented these roles in their QuickBooks invoices, but after trying pulling the data through Zapier directly, they realized the data just wasn't coming through.

It was clear Zapier alone wasn't going to cut it.

We helped them:

- Pull the report from QuickBooks
- Manipulate the data via Google Apps Script using code
- Map it to a Google Sheets for reporting purposes

We collaborated with multiple roles (Tax Manager, Tax Preparers, Operations Manager) to capture the requirements and bring this automation into fruition.





Ready to go from clunky, inefficient processes to smooth, highly automated systems?

We work with a select number of growing accounting firms on a monthly basis to help them unlock more capacity from your existing team with better systems, processes, and automations

 **Schedule Discovery Meeting**