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welcome  
we're happy you're here

Delicate Arch | Moab, UT





**Stuart Dean**  
**VP Sales & Marketing**  
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**Jason Caldwell**  
**CTO and Co-founder**  
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# What Accounting Has Gotten

**RIGHT & WRONG**

IN ITS MOVE TO  
THE CLOUD



## Today you will **learn:**

- What the cloud does well
- The inefficiencies the cloud has exposed and how to take advantage of them
- The new challenges that have emerged, especially for those whose migrations were poorly executed and hasty
- What to do now for maximum effectiveness from the cloud



## Poll #1

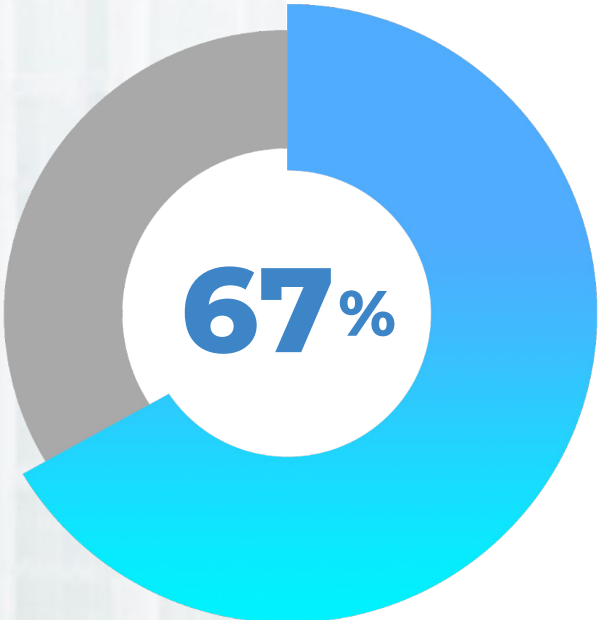
What **percentage** of your firm's applications are cloud-based?



# Cloud Computing

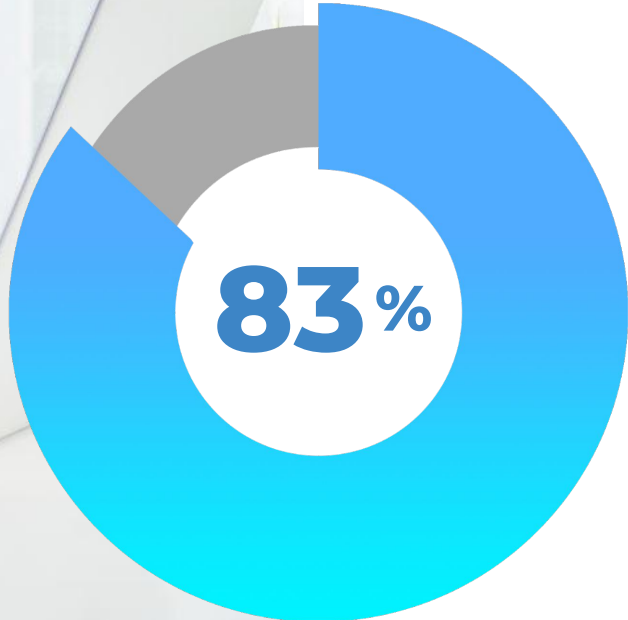


Where do **accounting firms** stand?



of accounting professionals **prefer** cloud accounting

Sage, 2021



of accountants believe they need to **keep up** with technology adoption to be **competitive**

Sage, 2020





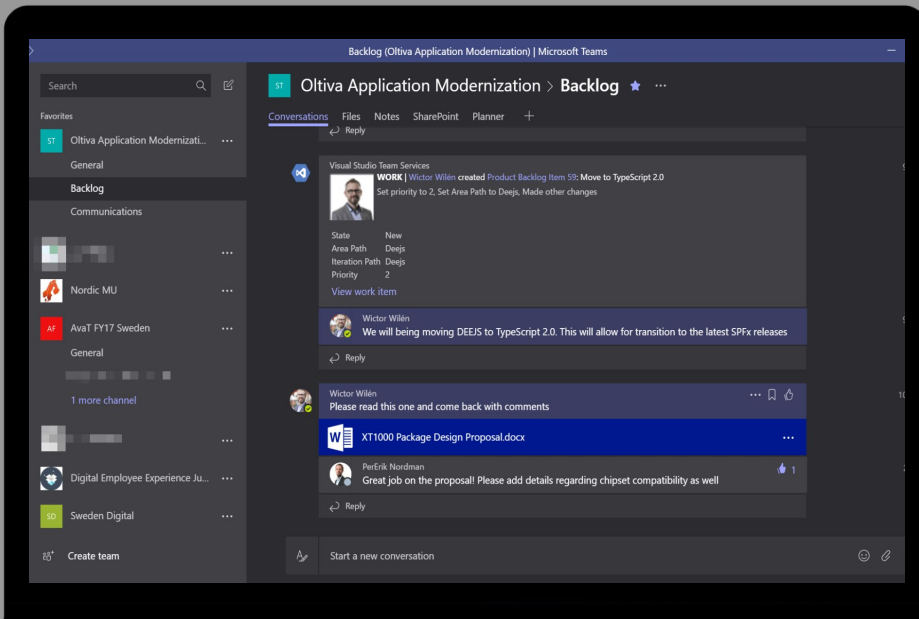
## Poll #2

Relative to other firms, how **automated** are your firm's historically labor-intensive processes like tax, payroll and auditing?

# Promises of the Cloud

- **Focuses Communications**

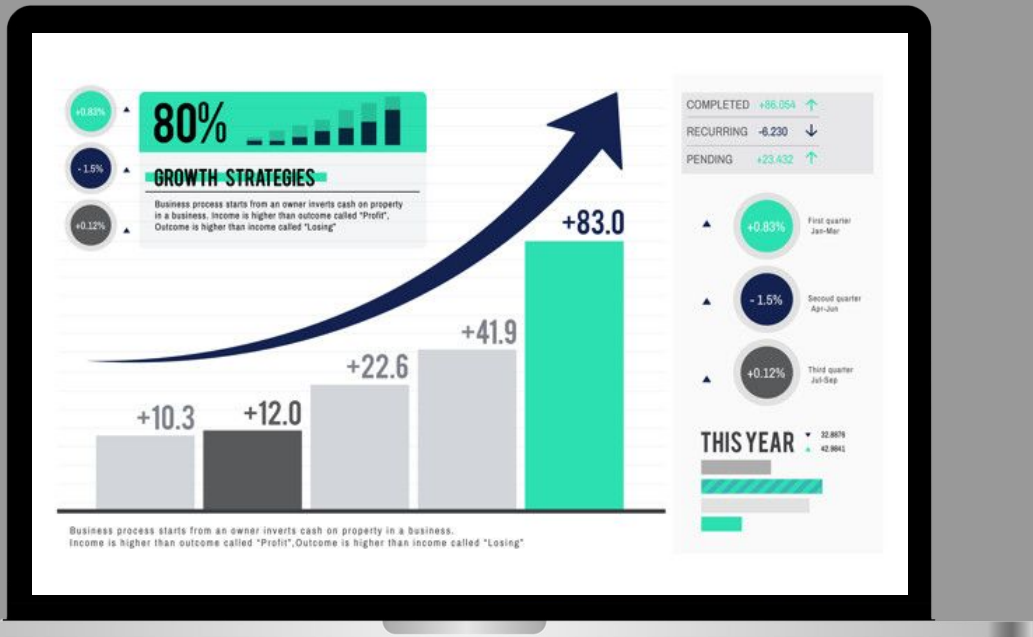
- Reduces inefficiencies
- Streamlines access
- Increases reliability
- Tightens security
- Reduces maintenance
- Saves money
- Improves scalability
- Increases options
- Uplevels experiences





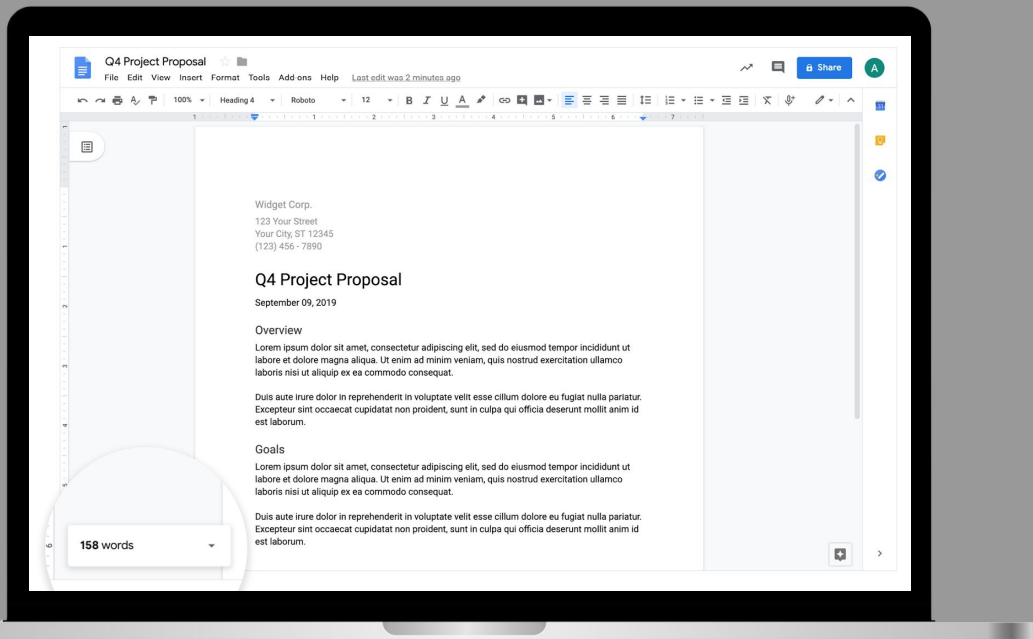
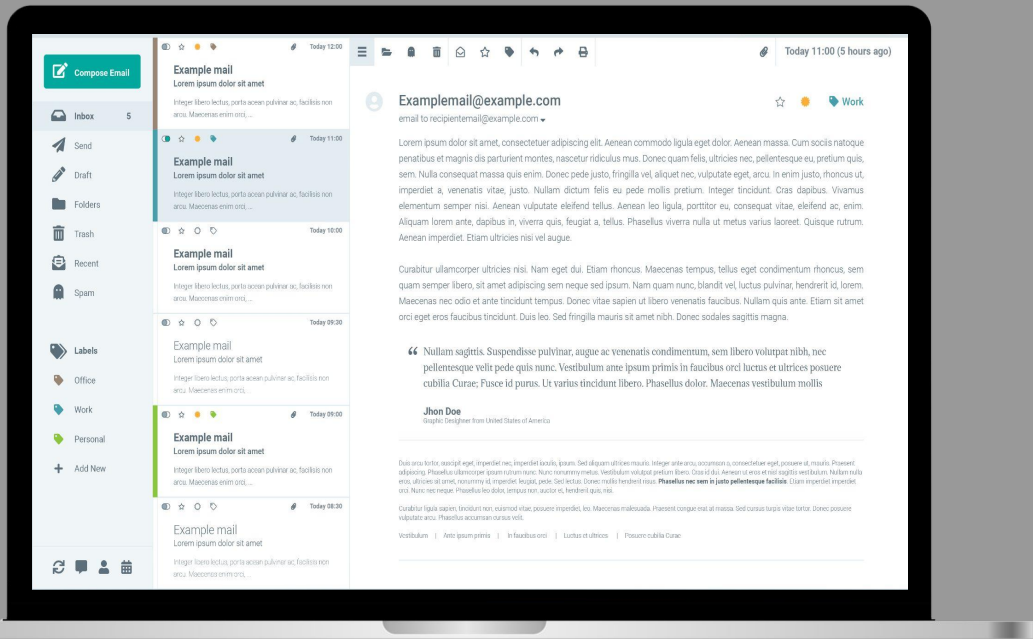
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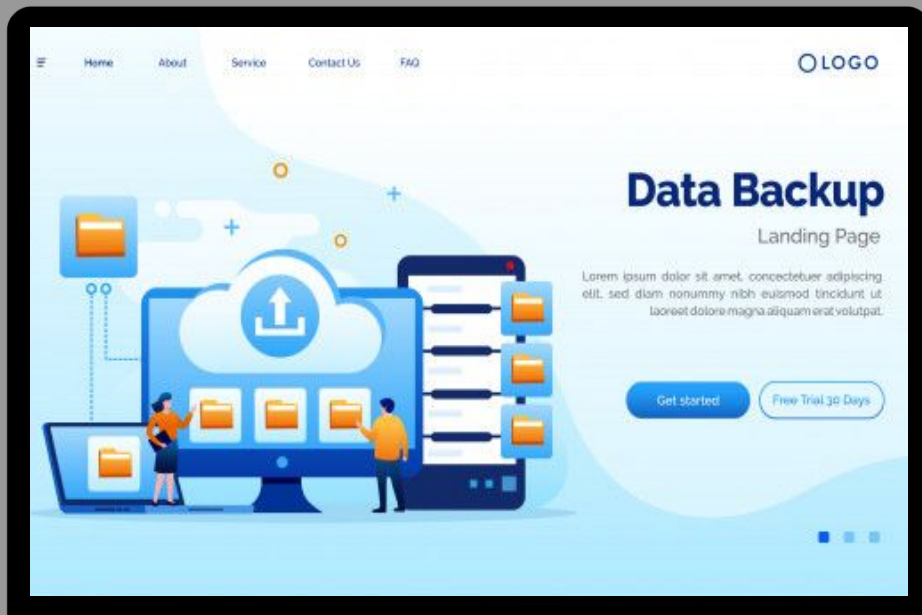
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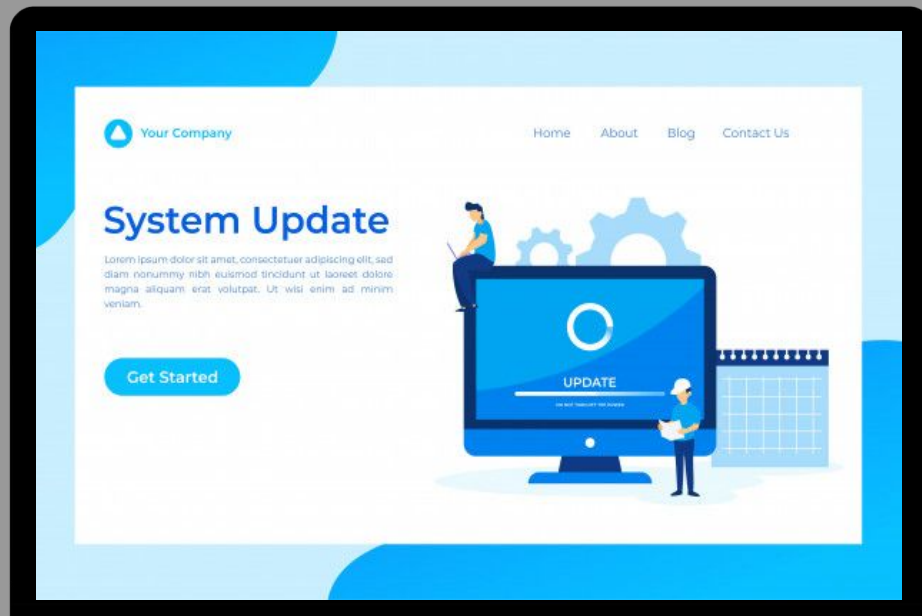
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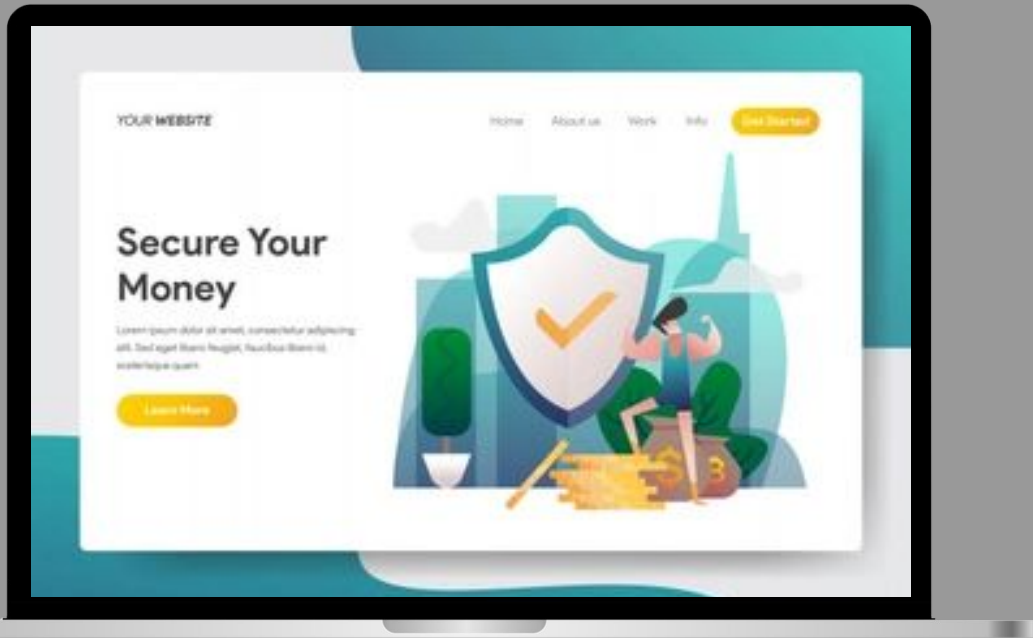
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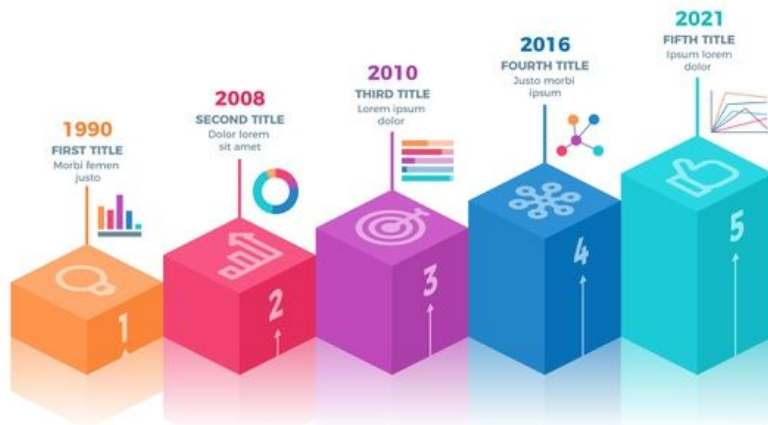


## New Project Process COMPANYNAME



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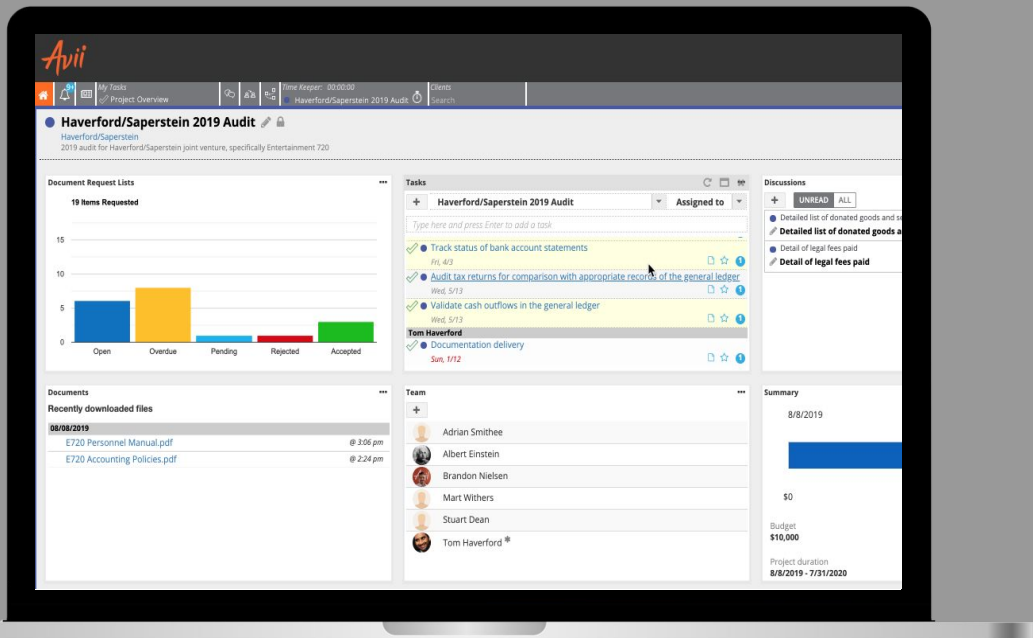
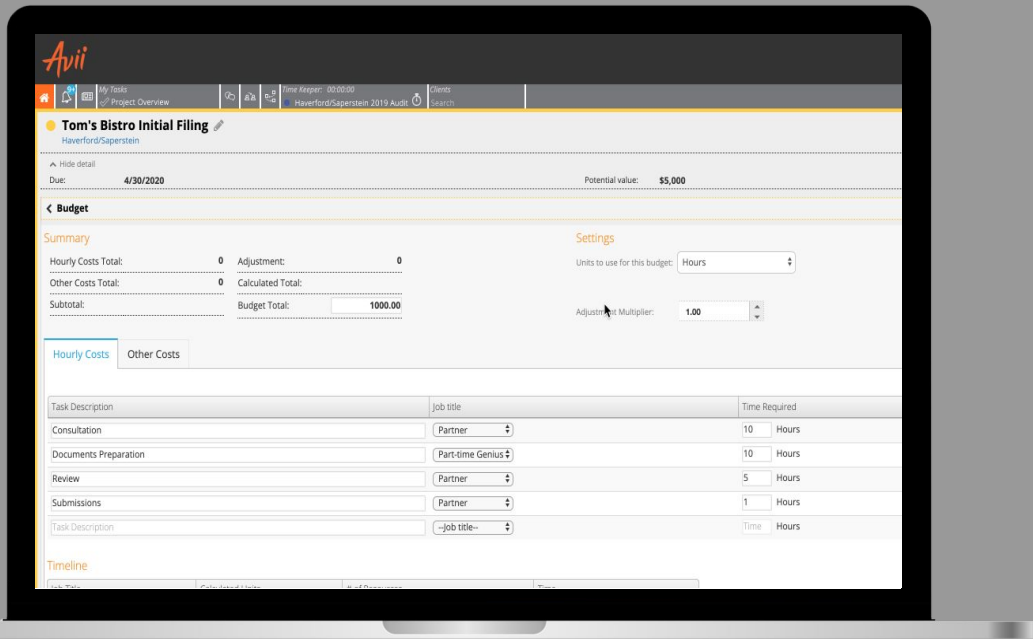
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# Downfalls of the Cloud

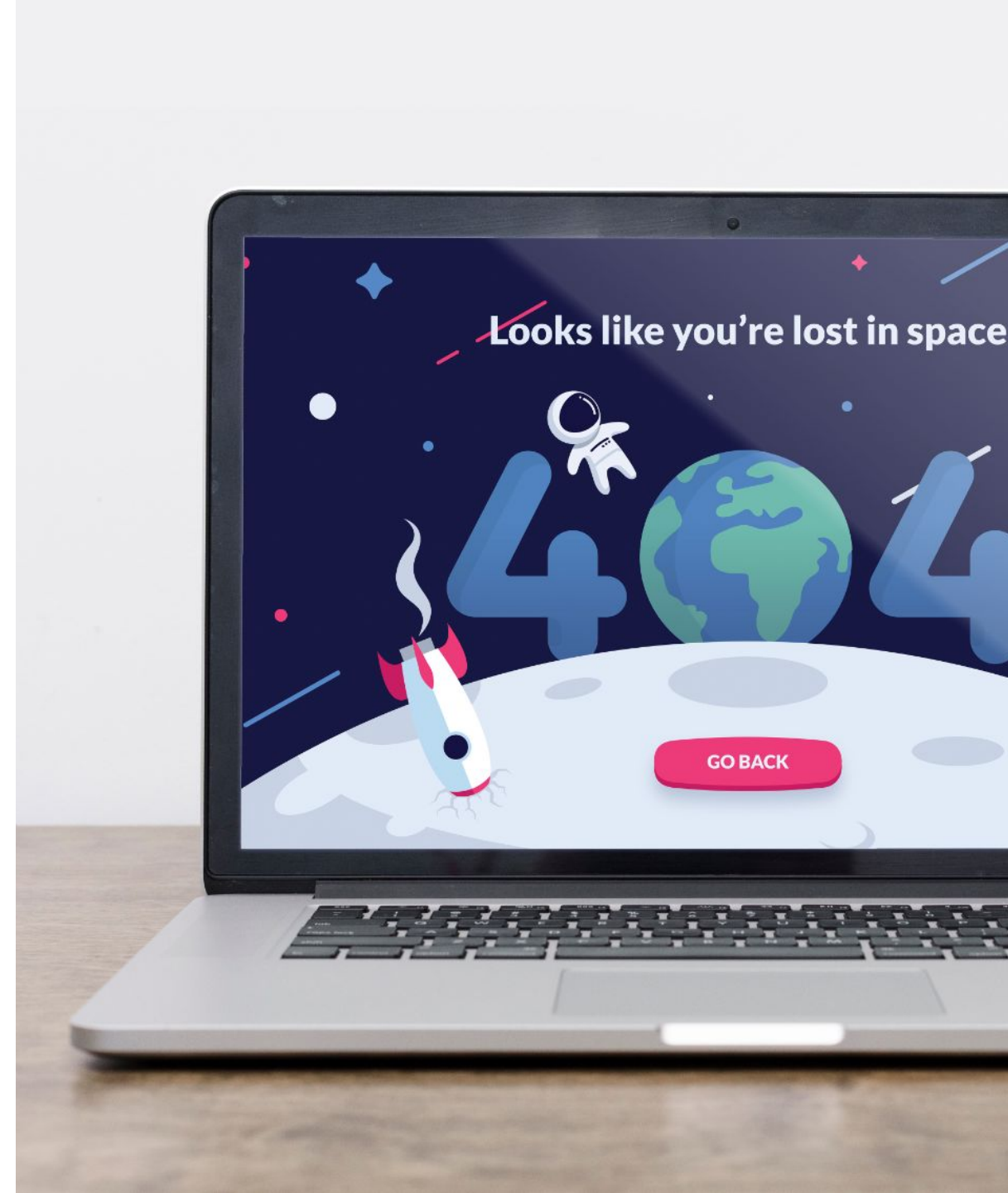
- **New ways to waste time**
  - The time it takes to jump between apps and duplication of work
- New risks to reliability
  - Being subject to application outages during times of high traffic
- Disconnected solutions
  - Applications that don't interact well with others
- Faux cloud solutions
  - Solutions that are merely a cloud-hosted version of what you were using before





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# Ask Yourself a Few Key Questions

- Is your **current** system giving you what you need or is it a cobbled set of processes?
- Or worse, so disconnected **you're falling behind?**
- Can you identify one to many areas you would like to **improve?**





## Poll #3

Is your firm on course with sufficient change management to **significantly improve** your relevance over the next two years?



# Cloud Computing **Best Practices**

- Prioritize customer experience
- Challenge existing workflows and technologies
- Align change management appetite with desired outcomes
- Automate everything possible
- Evolve staff competencies



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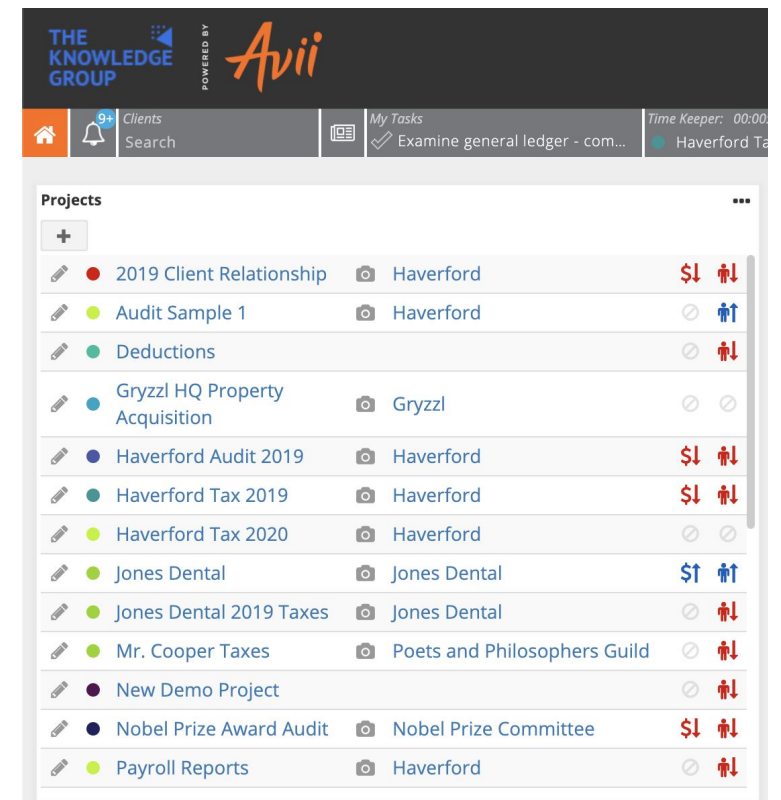
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## Poll #4

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