

THE BUSINESS BOTTOM LINE

Customer Experience and CRM to grow
your business

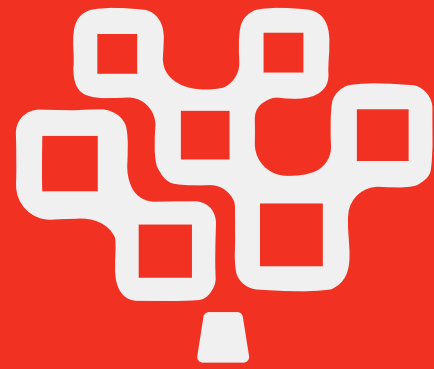


A series of decorative arrows pointing to the right, including a white outline arrow, a solid red arrow, and another white outline arrow.

WHAT ARE YOU LOVING ABOUT THIS CONFERENCE?

You just had a customer experience.

A solid red horizontal bar located in the bottom right corner of the page.



STAYS WITH YOU

Experiences are

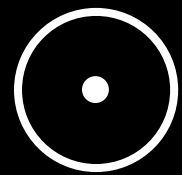
Memorable

Contagious

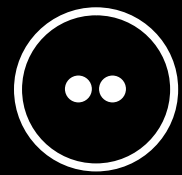


It's not enough to service our existing customers.
Succession planning is needed.

PILLARS TO HELP YOUR ACCOUNTING FIRM ACHIEVE GROWTH AND LOYALTY.



Customer Experience - Creating a unique brand ritual that makes the accountant's vision memorable and contagious through uniquely designed experiences.



CRM Backbone - Managing your clients and transforming them from buyers to raving fans through the systematic application of a robust CRM system.



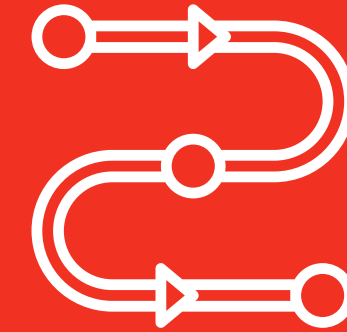
CUSTOMER EXPERIENCE DEFINED



It is your customer's perception on how your company treats them

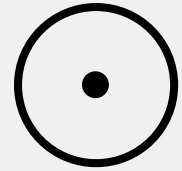


It is an interaction that leaves a lasting mark on the consumer's memories.



It is a process of taking care of customers that take into consideration their needs and provides them a path to solving thier problems.

BENEFITS OF GREAT CUSTOMER EXPERIENCES



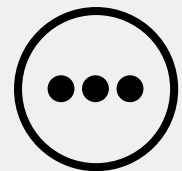
Differentiator

The new differentiator especially for service industries. Customers are willing to pay more for a customer experience they love!



Growth

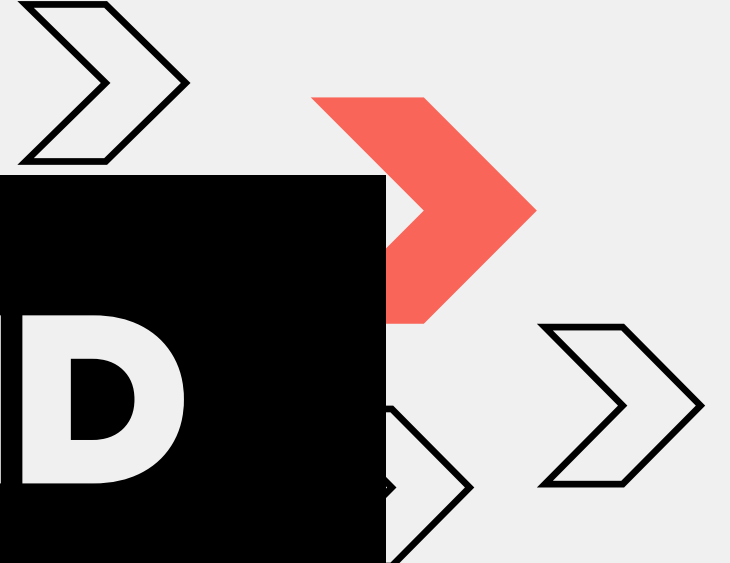
Customer experiences crafted well, will attract new customers to your business. It's what makes them try you out.



Loyalty

How you make the consumer feel, ultimately is what makes them stay with you for a long time.

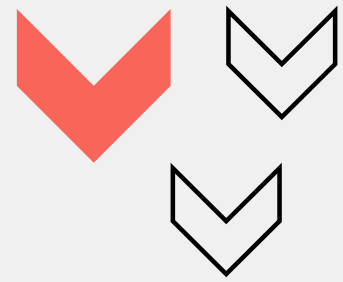




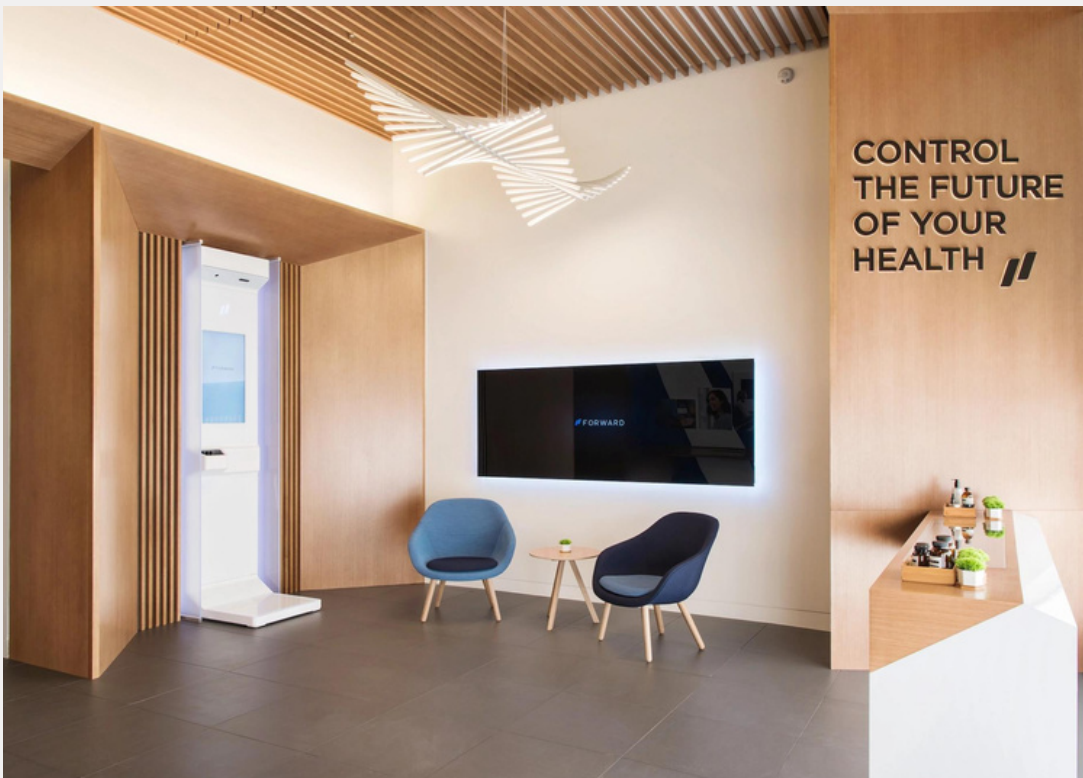
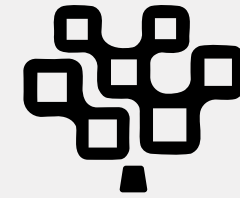
THE BRAND RITUAL

Customer experiences come to life through a brand ritual.

They are deliberately designed and integrated into our process to deliver a specific outcome.



// FORWARD

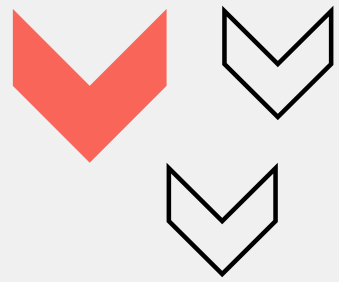


The Doctor's Office of the Future

Uses technology as a tool for preventive healthcare versus reactive healthcare. Their customer experience is driven by technology and gives you the feeling that you're in the clinic of the future.

- Home blood draw
- Smart sensors are integrated into your app and smartwatch.
- Giant screen where the doctors project your health measures and discuss each of them.
- Medical transcription so the doctor has their total attention on you.
- Preventive programs and medications are pushed to the app.

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founder tactics

On-Demand Webinar

How to Navigate Turbulent Markets

Sarah Guo General Partner, Greylock

Paul Jun CFO, Pilot

Watch now



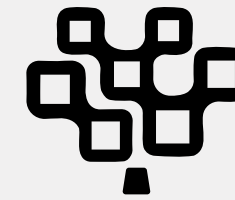
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Your Personal Accounting Team for Your Startup

Designed exclusively for start-ups and entrepreneurs, Pilot provides its clients a step-by-step scalable accounting and finance solution to help them grow their business through great accounting principles.

- Provides you with a personal accounting specialist whom you can reach out to through the app or the phone.
- Has an academy where you can learn the basics of accounting to understand what's happening.
- Has easy to understand scalable monthly packages designed to grow with your business.



BUILT ON A CRM PLATFORM

Beyond social media marketing and creating influencer campaigns, a robust CRM backbone designed to convert your clients into raving accounting fans systematically is one of the main determinants for an accounting firm's success.

Greta Mae Evans
CEO Company

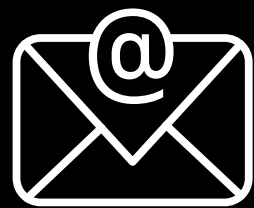
Success driven by technology

CRM Backbone

Social Media Ads



CRM Driven Website



Email



Targeted Ads



Drive to Office



Customer Experience



A carefully executed CRM system keeps you relevant to your customer through automation.



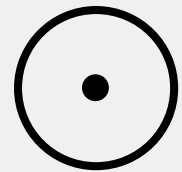
BENEFITS OF A CRM FOR ACCOUNTING FIRMS

- Automated Reminders during Tax Season
- Personalized emails and greetings
- Client Document Retrieval
- Logging Client Communications
- Assigning Client Work
- Efficient Customer Service
- Targetted Marketing
- Automated Invoicing
- Collection of Fees

By setting up automated systems for your firm, you minimize human error in client servicing and provide your client with a pleasant customer experience.



BUILDING YOUR CX AND CRM INFRASTRUCTURE



Ritualize

Identify your brand ritual to represent your organization best.



Path to Purchase

Map your customer path to purchase from awareness to loyalty.

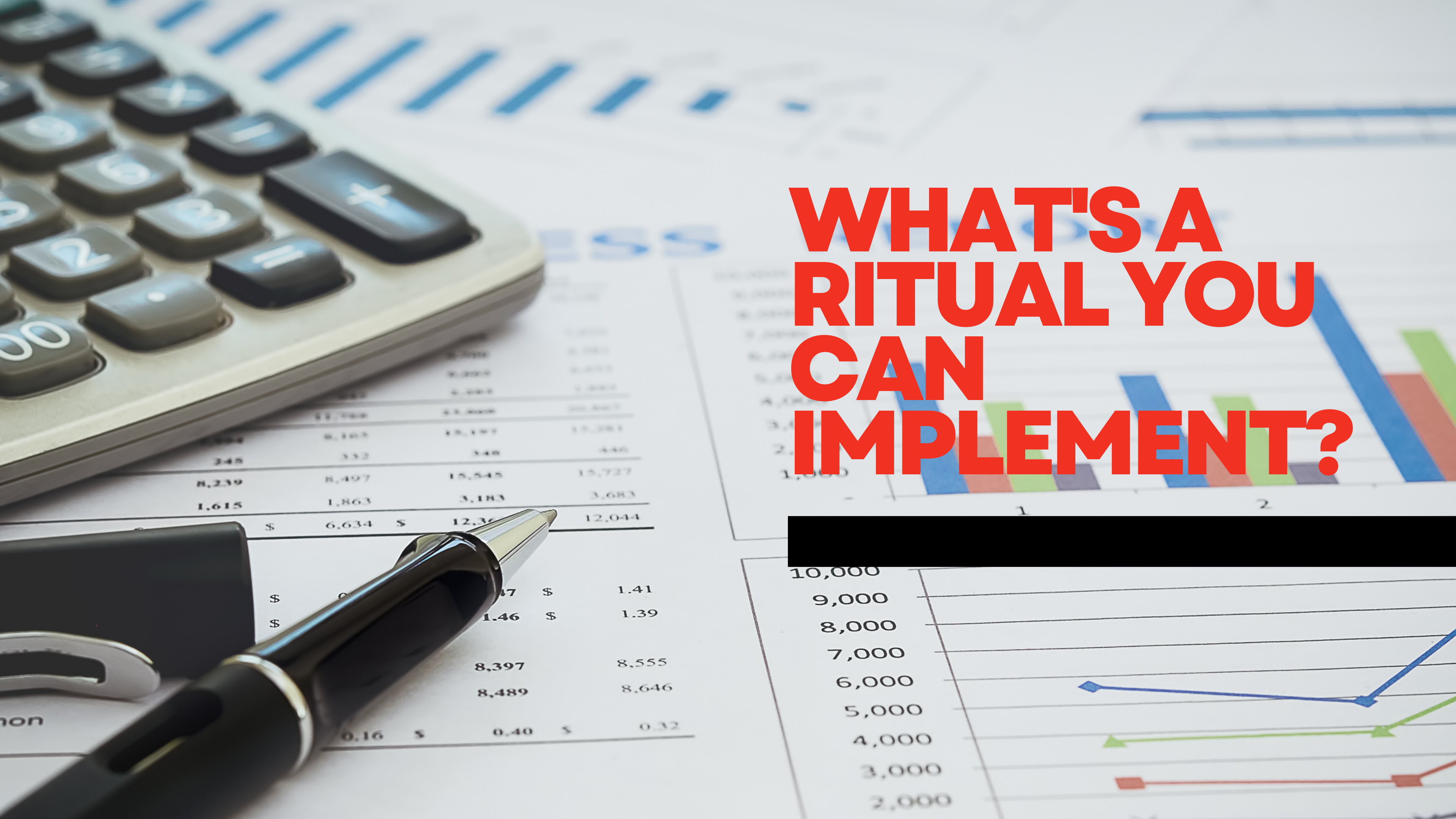


CRM Set Up

Identify a CRM system and integrate it into your marketing, sales, and customer service systems.

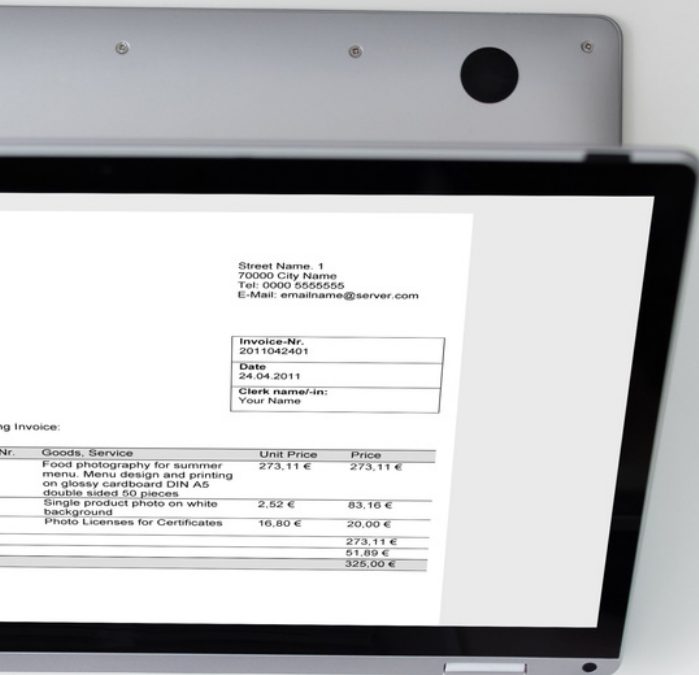


WHAT'S A RITUAL YOU CAN IMPLEMENT?



11,768	11,868	11,867	11,281
8,183	8,187	15,187	15,281
332	332	348	448
8,239	8,497	15,545	15,727
1,615	1,863	3,183	3,683
\$ 6,634	\$ 12,36		12,044
\$ 1.47	\$ 1.46	\$ 1.41	\$ 1.39
8,397		8,555	
8,489		8,646	
0.16	\$ 0.40	\$ 0.32	

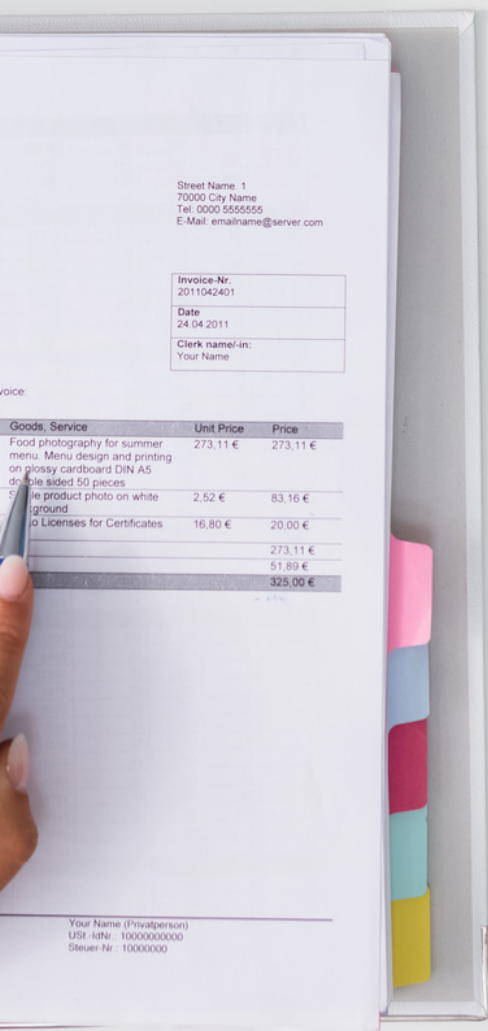




Street Name 1
70000 City Name
Tel: 0000 5555555
E-Mail: emailname@server.com

Invoice-Nr:
2011042401
Date:
24.04.2011
Clerk name-in:
Your Name

Nr.	Goods, Service	Unit Price	Price
	Food photography for summer menu. Menu design and printing on glossy cardboard DIN A5 double sided 50 pieces	273,11 €	273,11 €
	Single product photo on white background	2,52 €	83,16 €
	Photo Licenses for Certificates	16,80 €	20,00 €
			273,11 €
			51,89 €
			325,00 €



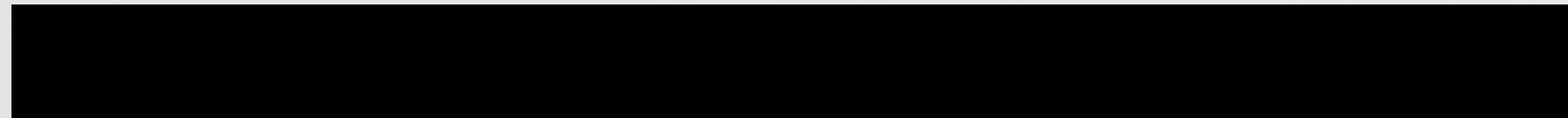
Street Name 1
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		273,11 €
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WHAT MAKES YOUR ACCOUNTING FIRM SPECIAL?



**WHAT IS YOUR
GOAL FOR
YOUR FIRM
THIS 2023?**



RECEIVE A **FREE 30-MINUTE** CUSTOMER EXPERIENCE AUDIT

