PRIMARY

Penelope

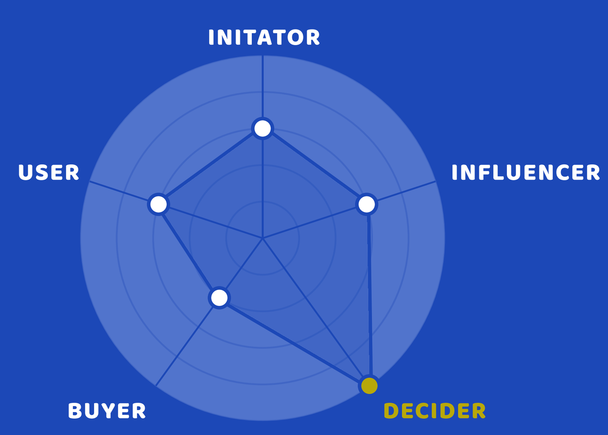
The Accounting Firm Partner

Extroversion — Introversion

Sensing — Intuition

Thinking — Feeling

Judging — Perceiving



Goals

Foster relationships with clients by delivering on expectations, sharing SALT/SUT insights, using discretion in communication, and providing valuable and demonstratable expertise.

Scale practice through delivering on KPIs, providing tools to increase efficiency without hiring, standardizing workflows outside of Excel, and remaining focused on our specifc niches.

Attract and retain top CPA talent, empowering them by providing the latest tools to make their jobs easier, through training on advisory vs. compliance, and by offering continuing education to ensure they stay at the top of their game.

Have our firm be recognized as smart, innovative, and top of class.

Save time and money by streamlining manual workflows, implementing better tools (than Excel), and managing scope creep.

Tasks & Responsibilities

Daily client relations, both prospective and existing.

Strategic planning with other partners, collaboration with cross-functional internal teams.

Coordinate and manage hiring of staff including writing job descriptions, interviewing, and making hiring decisions.

Stay up to date on regulatory news/changes and disperse to teams and clients.

Track, review & approve delivables.

Oversee new initatives, working with clients to define scope and budget on new engagements.

Needs & Wants

Maintain a harmonious relationship with clients with a clear understanding of what we're doing right and where we can improve.

Prevent clients from getting audited or litigated against.

Attract top talent and retain them through helping them succeed, stay happy, prevent burnout, and reduce friction.

Deliver results faster, ensuring nothing falls through the cracks.

Balance risks and rewards, avoiding unnecessary complications.

Maintain firm's brand integrity.

Stay relevant, innovative, and ahead of our peers.

Pains & Frustrations

Challenging to stay up-to-date with changing regulations, especially when dealing with slow state governments.

Clients don't inform us when things change (remote workers, online selling, etc).

Bothering clients for data, which is usually returned messy, in disparate formats, and can take a while to get. Hard to avoid being the 'bad guy' at times.

Too much new tech to choose from and learn. Difficult to bring firm into modern era through standardized workflows.

Difficult to be proactive within firm / bureaucracy.

Unable to meet needs of prospective clients with high exposure/needs.

Finding quality staff when there is fierce competition and staff shortages.

Aaron

Acounting Firm Associate

Extroversion — Introversion

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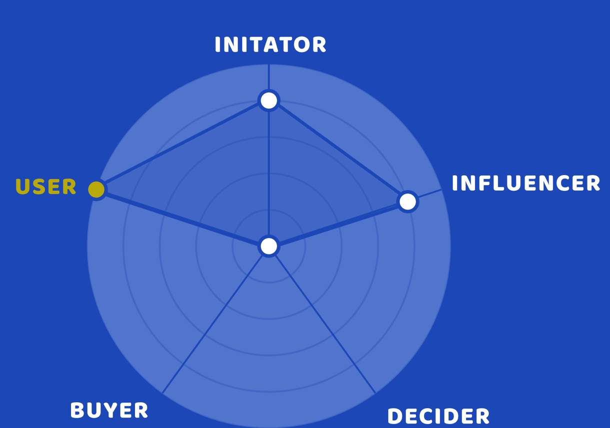


Goals

Stay organized, impliment my work accurately, quickly and on time while keeping my team members in the loop.

Ensure my firm leadership, and my boss, Penelope, remain happy and impressed with my contributions

Stay on top of continuing my accounting education, using the latest tech wherever possible.

Be an expert in my domain by continuing my accounting education, staying on top of the latest changes in regulations, and by striving to use the latest tech wherever possible.

Keep my clients happy by providing answers to questions, clear communication, saving them time, money, & hassle

Reduce friction, avoid costly mistakes, minimize risk, and resolve open issues.

Tasks & Responsibilities

Analyze client information through crunching numbers, writing/updating excel macros and double-checking my work.

Multi-lateral communication with my firm's leadership, vendors, state governments and clients.

Work directives from leadership as they arise.

Stay organized, track & meet deadlines, improve upon existing workflows as necessary.

Coordinate with clients to regularly request, consolidate, normalize, and ultimately input that data into internal tools and repositories

Help onboard new clients

Stay on top of continuing my education

Needs & Wants

Impress leadership & my boss, Pennelope

Be a hero for my clients through building strong relationships, understanding their needs, keeping them informed, and being a reliable and competent resource

Deliver results by being a problem solver and getting things done on-time and accurately

For clients to deliver their data on-time and in the proper format

Be perceived as proactive, helpful, and valuable by partners in my firm.

A way to automate redundant tasks and improve processes and workflows.

Support to develop my skills & knowledge

Receive timely updates on changes to policy changes

Pains & Frustrations

Too much on my plate, and looming deadlines aren't helping

The laws/regulations change a lot

I'm perceived as the 'bad guy' to clients, perhaps scaring them away

Often waiting on clients to get me their data, which is usually a mess. Difficult to predict their needs.

Slow to affect change due to leadership buy in

Difficult to make time to learn new things in this steep learning curve

Difficult to stand out amongst peers

Too many eComm source systems and other tech

Cathy

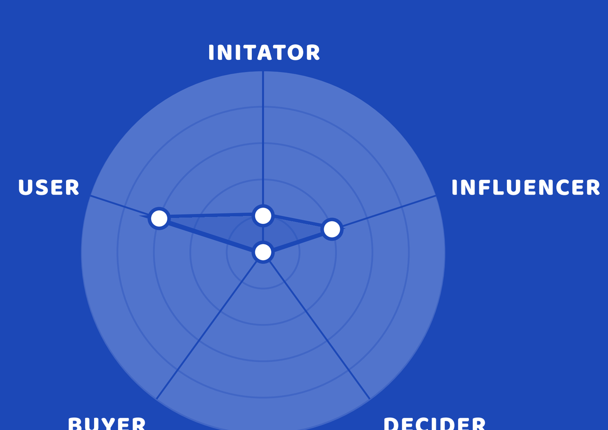
The Curious Client

Extroversion — Introversion

Sensing — Intuition

Thinking — Feeling

Judging — Perceiving



Goals

Determine if LumaTax is a reputable company

Understand what LumaTax does and why my accountant sent me here

Share data securely with my accountant

Get answers about sales tax laws and regulations

Learn about how other business have had success with LumaTax.

Avoid becoming "overbought" in compliance

Understand the implications of doing business in different states

Tasks & Responsibilities

Manage relationship between my business and my accounting

Strategic planning with other partners, collaboration with cross-functional internal teams.

Deliver data to my accountant on a regular basis

Perform due diligence, research vendors, and perform cost-benefit analysis of LumaTax

Protect business and avoid costly mistakes

Needs & Wants

An easy way to share transaction data with my accountant

Mitigate risk of non-compliance, keeping my business safe from audits and excessive fees.

Learn the basics about sales tax nexus and understand when my business may reach threshold

Ensure my data is safe by avoiding emailing sensitive information

Work smarter not hardner, making things easier.

Avoid costly mistakes and save money

Grow my business and increase sales

Pains & Frustrations

I have to do this work? What am I paying my accountant for? My accountant is annoying

I have to send my accountant this data every month. Can't I automatically connect this to Amazon? Why am I emailing?

I don't fully understand what Nexus is. The laws are confusing.

I'm concerned about giving my accountant my eComm platform login. I'm worried about where my data goes and if I'll get hacked

I don't want to give the government more money than I have to. Sales tax is the worst of all taxes.

I've screwed up my sales taxes and I don't know where to start/