

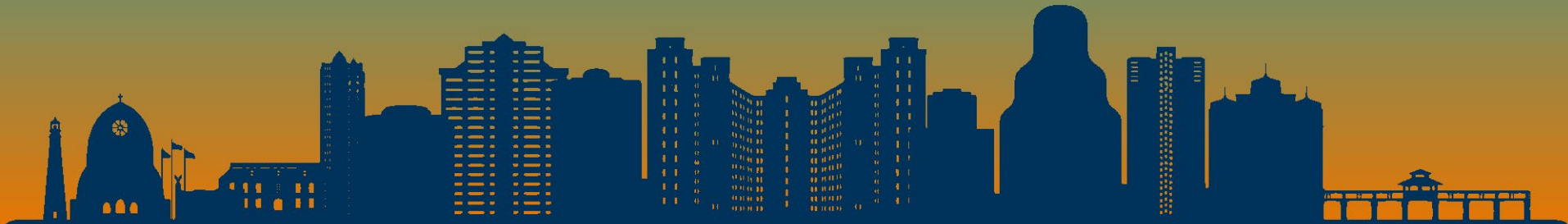
Tom Quinn – Bennett Thrasher  
April 12, 2024



# REIMAGINE NOW

LEA GLOBAL NORTH AMERICAN REGIONAL CONFERENCE

**COO/CFO/Controller Collaboration group**



# Today – C00/CF0/Controller group

## Run of Show

- *“State of Your Firm” – LEA/Inside Public Accounting (IPA) Survey* 9:00 -10:30 AM
- *Coffee Break – Coffee Break* 10:30 – 10:50 AM
- *Technology Implementation – Use Cases*
  - *Dayshape: AI assisted planning and scheduling platform* 10:50 – 11:00 AM
  - *Aiwyn: Payments/Collections & Practice O/S Platform* 11:00 – 11:30 AM

# Strengthening our Alliance

- *Steering committee agenda - “an eye toward fostering greater partnership & collaboration”*
- *Share our accomplishments – What worked/What didn’t, Become a resource, Specialties*
- *LEA/Inside Public Accounting (IPA) Survey - 3 key Questions*
  - *Strategic Changes made in 2023*
  - *Strategic Changes planned for 2024*
  - *Top 3 firm challenges in 2024*
- *Results in August 2024 - Polled our member firms (shout out to Carla)*
- *I will share BT’s survey responses and then split into breakout session*

# Strategic Changes made in 2023

## LEA / IPA Survey

- *Transitioned the firm from a fiscal to calendar year-end.*
- *Moved into the Denver market & expanded Dallas footprint.*
- *Executed M&A as a new growth strategy. Closed first acquisition (Denver).*
- *Re-instituted Client “convenience fee” charge on credit cards. Implemented AIWYN payments and collections solution. Added Administration & Technology Fee.*
- *Initiated a partner Draw reduction/Draw recovery plan to instill business/collection accountability.*

# Strategic Changes planned for 2024

## LEA / IPA Survey

- *Launched two new service lines: BT Finance Executive Search & BT Fund Administration. \**
- *Invested in resource scheduling capability/AI with Dayshape\*.*
- *Evaluating investment in engagement letter automation capability.*
- *Invested in Partner dashboard reporting (Power BI) as a toolset to provide real-time data/metrics to manage their books of business effectively.*
- *Operational initiatives: Accountability for billable hour goals, Revamped nonbillable time entry, Workforce planning tools, Write-downs, “D” Client Culling, Rate increases for 2024-25.*

**Completed \***

# Top 3 firm challenges in 2024

LEA / IPA Survey

- Staff retention
- Technology
- Profitability

A screenshot of a survey dropdown menu. The menu is open, showing a list of 14 challenge categories. The top item is 'Staff Retention', which is selected and highlighted in a dark grey bar. To the right of the list, there are three 'n/a' labels, each preceded by a small dark grey square icon. The 'n/a' labels are aligned with 'Collections/AR', 'Managing Remote Workforce', and 'Staff Development'.

Challenge Category	Response
Staff Retention	
Collections/AR	n/a
Economy	
Growth	
Leadership Development	
Managing Remote Workforce	n/a
Partner Issues	
Pricing	
Profitability	
Staff Development	n/a
Staff Recruiting	
Succession	
Technology	
Other	

# Breakout Session

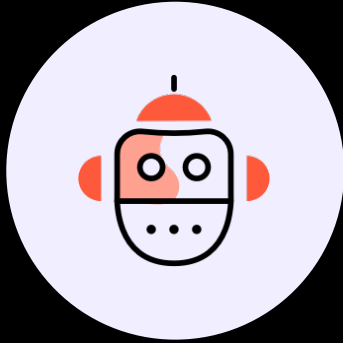
- *3-4 equal groups at each table*
- *Discuss with your group and list your top 4-5 responses for each of the three questions*
- *Take 20 Minutes at the tables to answer the three questions*
- *Use the next hour to present and discuss the responses*
  - *Need a scribe (Participants Name, Role, Firm), table responses*
  - *Each group will present answers for question 1 and we will have discussion period.*
  - *Repeat until we have completed all three questions*

# Dayshape : AI planning/scheduling platform

- *Takes the heavy lifting out of scheduling by surfacing suggestions & opportunities that enable use to make choices capably and efficiently (Scheduling Role, Traits, Reporting)*
- *Promises to unlock greater utilization and realization.*
- *The integration with Star (PMS) bolsters efficiency, when it comes to reporting.*

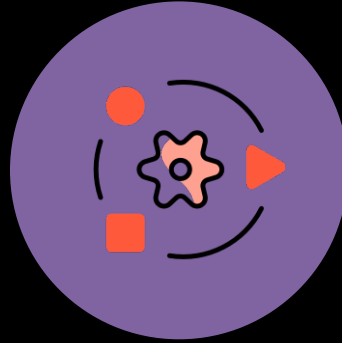


# WHY FIRMS BUY DAYSHAPE



## AI-POWERED

Resource  
Allocation



## AUTOMATED

Budgeting & Project  
Controls



## DATA INSIGHTS

Project Financials  
& Reporting

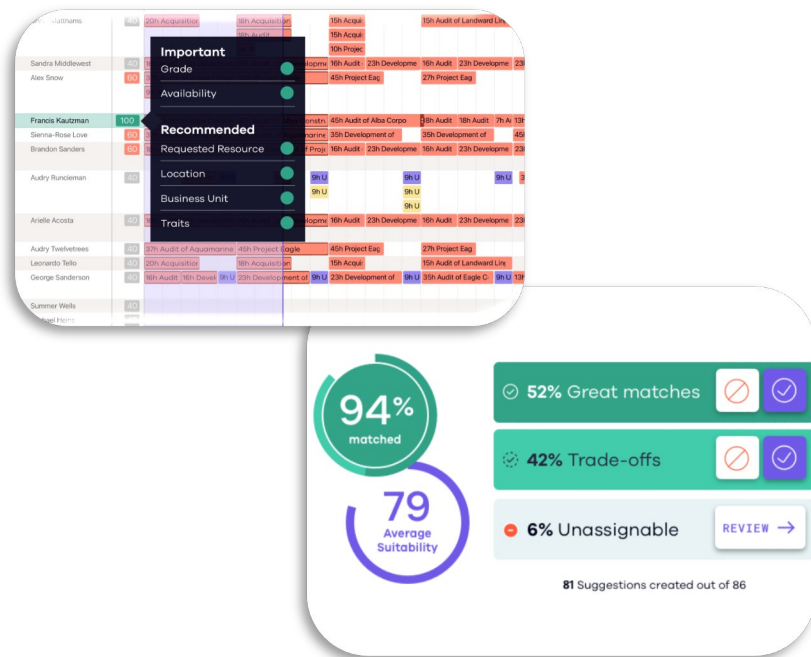


# What is the “right” resourcing decision?



# AI-powered resourcing

Proven global-scale scheduling engine



- Increase and balance utilization
- Improve efficiency and reduce time to staff
  - Assess suitability of entire workforce in seconds
  - Advise: Surface suggestions or automate allocation decisions in seconds
- Maintain an optimal workforce plan at all times
- Attract and retain talent
- Unlock proactive and strategic resourcing

# The goal: elevating resource management into a force for growth

## Grow Revenue

- Efficiencies at scale
- Increase utilization by more effective deployment of staff
- Win more business
- Free billable staff from administrative resourcing
- Bill more by reducing write-offs
- Budget more effectively and consistently
- Spend more time on the most profitable engagements
- Strategic decision making

## Improve working lives

- Improve client service
- Deliver rewarding careers and retain top talent
- Reduce compliance risks

# The future: next-level resource management

Can you forecast engagement financials and help the business get it back on track?

Can you provide revenue forecasts that are based on your resource plan?

Can you optimize the schedule for employee skill preferences (or other factors) and explain the impact on margin?

Can you inform project pricing?

Can you inform hiring or sales strategy?

Tactical

Strategic

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# Practice OS Platform

**Pat Morrell – Chief Revenue Officer & Co-founder**

**Thank you!**

