

AI UNCHAINED

Accounting Intelligence. No boundaries. No limits.

2024



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REMOTE TEAM ROADMAP: INCREASE REVENUE AND REDUCING OVERHEAD

TUESDAY, OCTOBER 8

PRESENTERS:



SHARRIN FULLER

**CHIEF EXECUTIVE OFFICER,
GLASS WALLET**



NICK BOSCIA, CPA

**PARTNER,
BOSCIA & BOSCIA P.C.**



Hi, I'm Sharrin!

- CEO of Glass Wallet Ventures, LLC and CORE Financial
- Creator of the Scaleable to Saleable and Remote Team Road Map
- Sold her first business for \$2 Million Dollars
- Have acquired 3 companies and grown each one to \$1 million in one year
- Passionate about teaching others how to build, scale and sell a business successfully



Hi, I'm Nick!

- Joined family-owned accounting firm Boscia & Boscia PC in 2013
- CPA & EA committed to continuous education
- Known as “TheBalancedCPA” helping firms grow while creating balance & fulfillment both professionally and personally
- Passionate world traveler with a goal to explore 100 countries around the globe.

When, Why, and How to Recognize Your Firm Should Go Remote



Your Remote Checklist

Talent Availability:

SCALEABLE **SCALEABLE**

Remote-Readiness Checklist

Determine if your business, in its current state, is ready to embrace remote work as it presents significant opportunities for scalability, cost reduction, and talent acquisition.

Scalability:

- Is your firm experiencing rapid growth that's outpacing your current office space? Y/N
- Are you looking to expand your client base beyond your local region? Y/N
- Do you find it challenging to scale operations due to the limitations of physical office space? Y/N
- Could reducing or eliminating office space lead to significant cost savings? Y/N

Cost Inefficiencies:

- Are your overhead costs (e.g., rent, utilities, office supplies) taking up a large portion of your budget? Y/N
- Does managing an in-office team seem to be more costly than productive? Y/N
- Are you considering transitioning your manual processes to automated software solutions? Y/N

Client Needs:

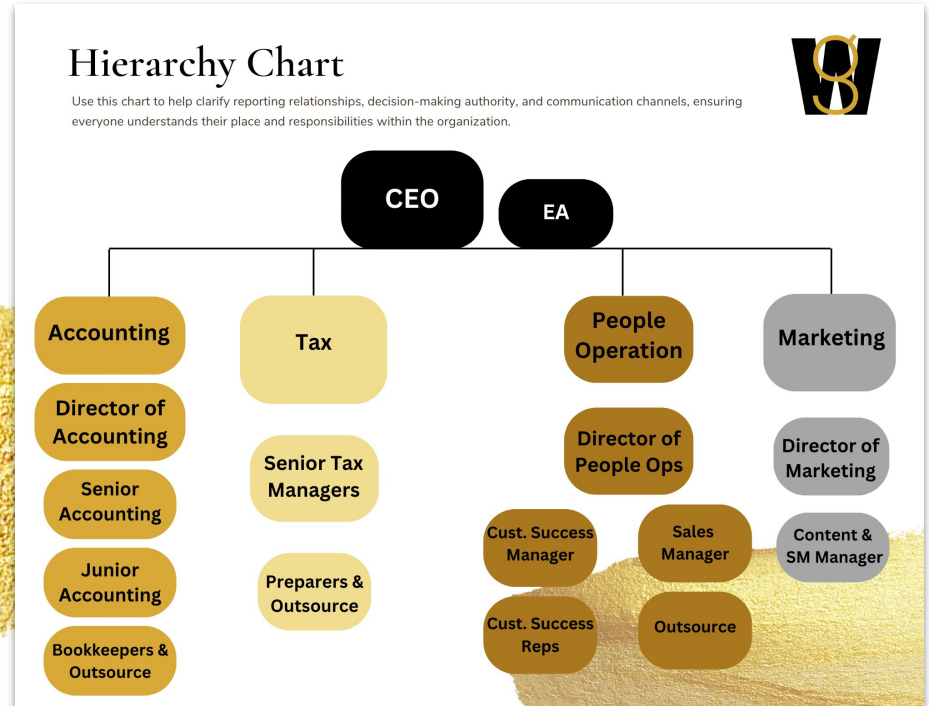
- Do your clients prefer virtual meetings or have you received requests for remote services? Y/N
- Is your client base expanding to regions where face-to-face interaction is impractical? Y/N
- Could a remote setup help you provide more flexible service options for your clients? Y/N
- Are your clients comfortable using online tools and platforms for communication and project management? Y/N

W

Building the Foundation of a Remote Team



The Hierarchy Handout



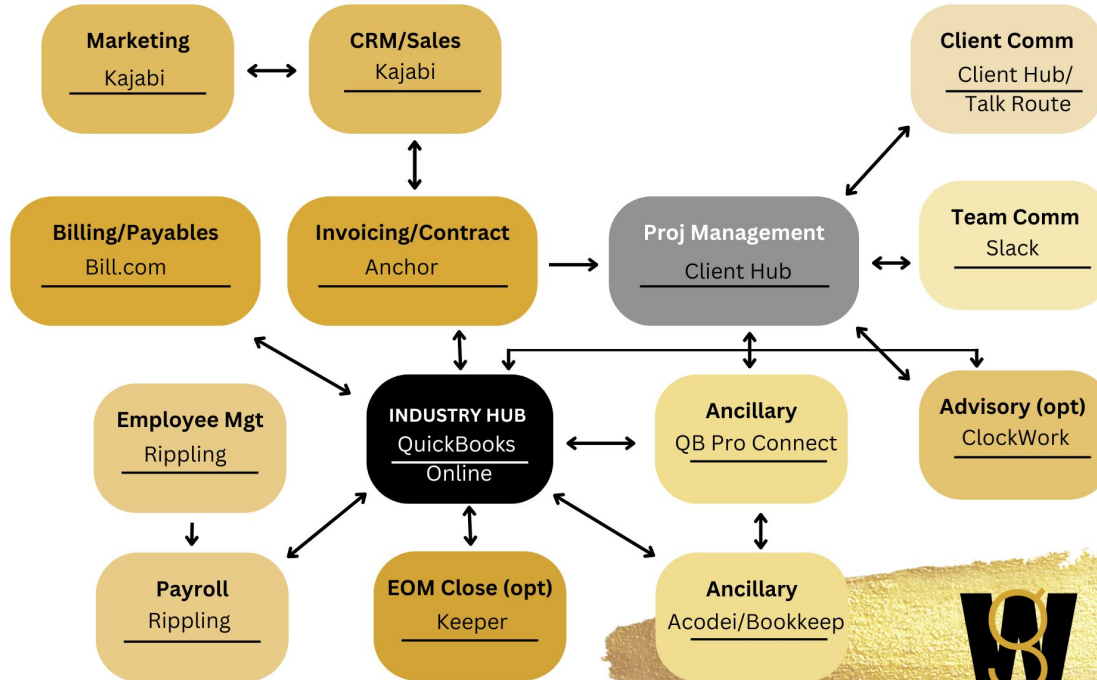
Choosing and Implementing the Right Cloud Technologies

Streamline operations, enhance collaboration, and build a scalable remote team with the right cloud tools.

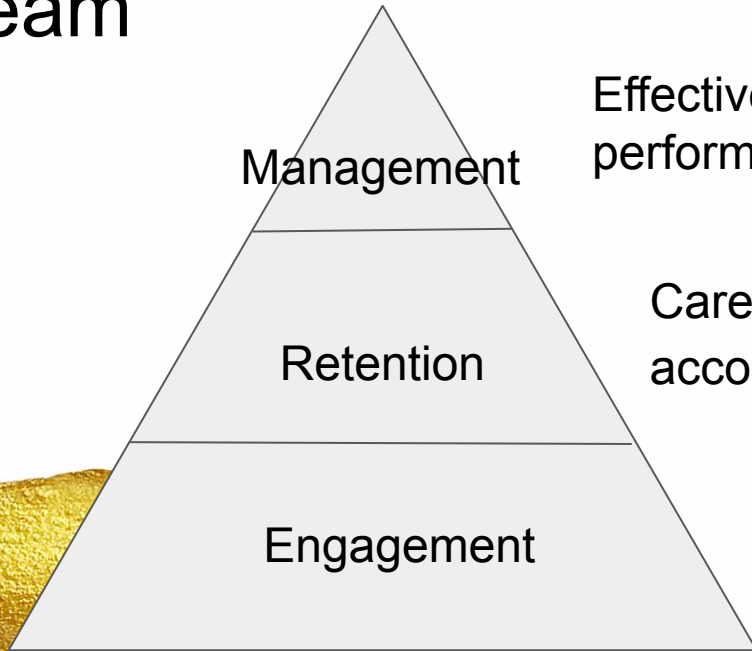


Internal Software and Flow Process

Use this chart to assess your tech stack in your business and make note of any strengths, weakness and the scalability.



Engaging, Managing & Retaining a Remote Team



Effective task delegation, remote tools, and performance monitoring

Career development, feedback, and process accountability

Clear communication, culture-building activities, and recognition



Activity!

Outsourcing When & Why

When:

- Tasks are repetitive, low-value, and consume too much time.
- When in-house teams are stretched too thin, and deadlines are missed
- The cost of hiring or training in-house exceeds the benefit

Why:

- Reduce overhead and operational costs.
- Focus the internal team on high-value tasks.
- Increase efficiency and scalability.



Outsourcing WHO

KEEP - Client relationship and advisory roles

OUTSOURCE - non client relationship and non advisory roles



A blurred background image showing a person's hands holding a smartphone. The person is sitting at a white table with a laptop and a white coffee cup. The scene is brightly lit, suggesting an office or cafe environment.

Let's Take 5.....

Boscia & Boscia PC: A Journey of Family, Technology, and Growth



Our Roots: Founded in 1975

- Founded by Joe Boscia Sr.
- Manual processes, minimal tech.
- Hard work and dedication built a strong foundation.



A New Generation, A New Vision

- Joe Jr. focused on growth, Nick focused on tech & processes
- Began modernizing processes
- Key learning from conferences
- Networking & Collaborating



Transforming the Firm

- Adopted SmartVault, Anchor, Calendly, Financial Cents.
- Doubled client base to 1,800.
- Streamlined operations, improved work-life balance.

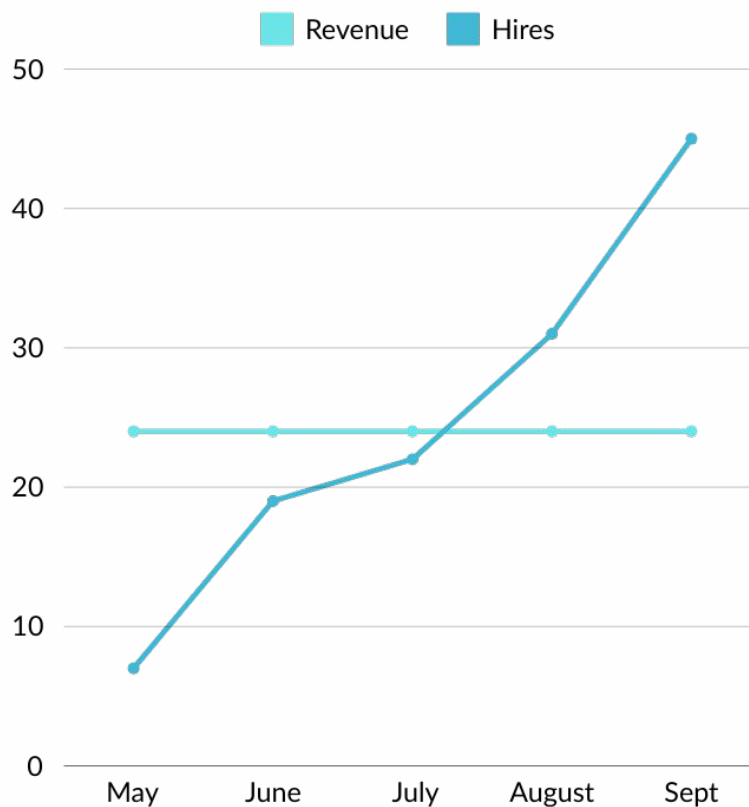


The Future of Boscia & Boscia PC

- Continuing to automate and scale.
- Balancing growth with client satisfaction and team well-being.
- Focusing on next-level tech and efficiency.



Forecasting Hires and Revenue Growth



New Hire Calculator

Monthly Rev	150000	
Hourly Rate	250	
HOURS	600	Rev divided by Hourly RATE
Staff Needed	4	HOURS divided by 160

Scaling Your Virtual Firm



Step 1: Small Team Operations

Step 2: Leverage Remote Teams

Step 3: Adopt Advance Technology

Step 4: Expand Service Offerings



Activity!

Enhancing Client Experience in a Remote Firm

Communication:

- Regular Virtual Check-ins
- Clear Communication Channels
- Real-Time Updates

Collaboration:

- Client Portals
- Virtual Collaboration Tools
- Full Visibility



Enhancing Client Experience in a Remote Firm

Maintaining Strong Client Relationships Remotely

Seamless Document
Sharing



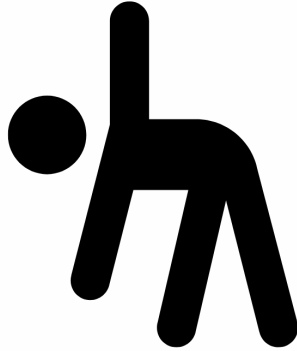
Client Touchpoints



Transparency in Project
Management



Creating a Sustainable, Remote-First Culture



Flexibility

Allow flexible working hours and locations to accommodate diverse team needs and improve work-life balance



Diversity

Create a team that reflects diverse backgrounds, perspectives, and cultures to foster innovation and global reach.



Inclusion

Encouraging open communication, celebrating different cultures, and creating space for all voices in virtual meetings.

Creating a Sustainable, Remote-First Culture



Final Steps to Implementing Your Remote Roadmap

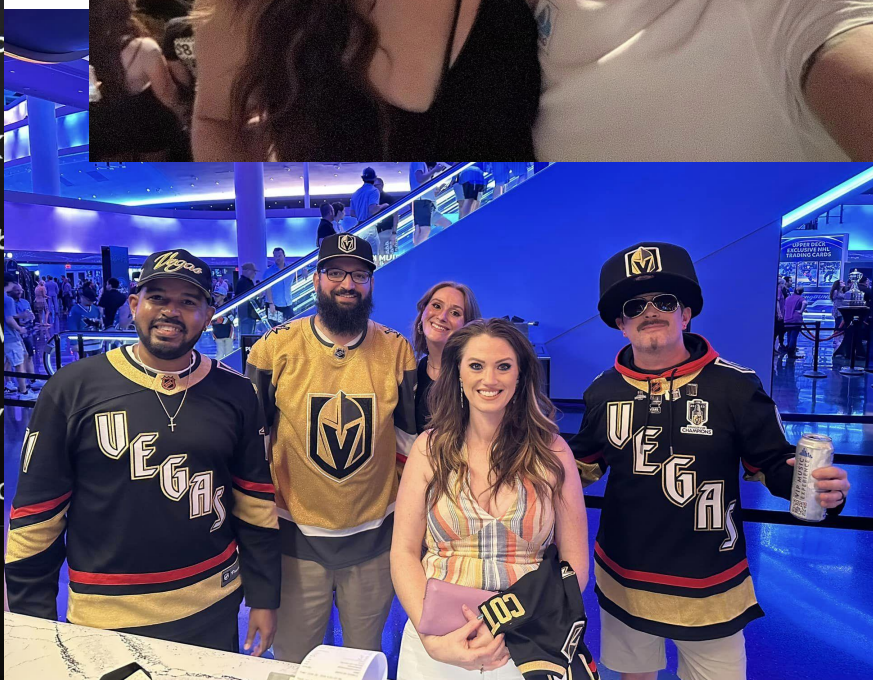
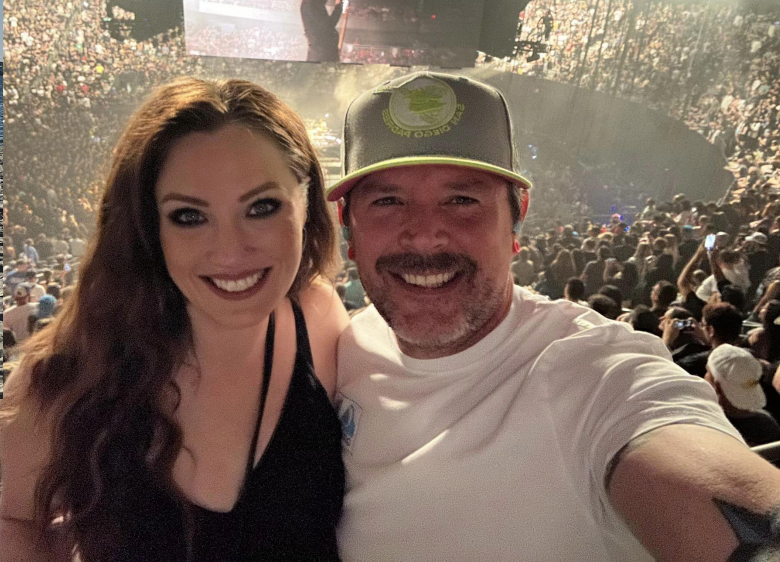
Communication

Consistency

Follow Through









Q&A

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THANKS!

The background is a deep blue color with a complex digital pattern. It features a grid of small, light blue dots and lines that form a circuit-like or data-stream aesthetic. The lines are thin and vary in brightness, creating a sense of depth and movement. The overall effect is a modern, technological feel.