

Scaling Up CAS Services with Automation



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Say Hello to Brigade

Scaling Up CAS Services with Automation

Your Specialized Partners for Accounting and Financial Insights
Contact elizabeth@hellobrigade.com

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Elizabeth D. Manso, CPA

Founder

Brigade is a full-service client accounting services firm.

Elizabeth shares her insights and best practices for leveraging AI and creating a winning culture of team engagement.



About Brigade

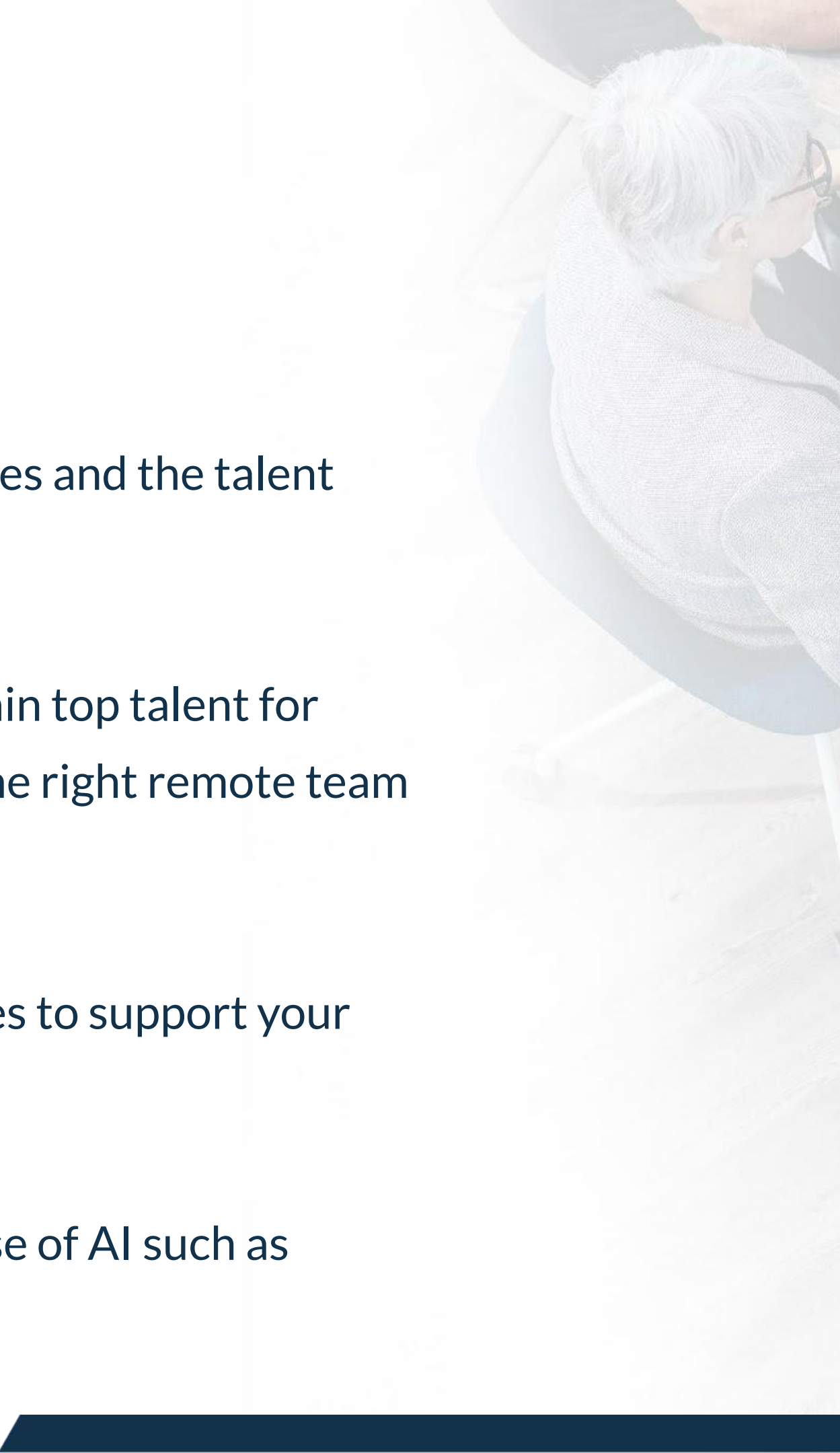
Elizabeth's own plan to go fully remote and scale her firm was enacted prior to the pandemic.

Brigade has a proven roadmap for any firm looking to adapt to the changes shaping the future of CAS.





Learning Objectives:

- Evaluate the delivery of your services and the talent you need to support their delivery.
 - Understand how to attract and retain top talent for virtual outsourcing and to secure the right remote team for your practice.
 - Determine appropriate technologies to support your virtual firm and virtual team.
 - Take away tips for optimizing the use of AI such as Botkeeper to scale your firm.
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Technology creates the product and we deliver the insights and have facetime.



Offer deeper advisory services, tech can do a lot of troubleshooting.



Brigade grew 25% over last year with the same size team.



2023 we are on track to hit the \$2 million dollar mark with 7 billable employees.

Growing a firm can be frustrating.

However, with a clear vision and a passion for building a firm that serves clients and goals, everything is simplified.

Client service, the right tech, and the right people are essential.



Our Process

- I focus on being a rainmaker, profitable and efficient, net profit is 25%.
- I meet with my team regularly but they execute.
- AI and other technologies are absolutely essential.
- We are focused on customer service.
- Clients want service and our professional team needs the ongoing support of technology to provide it



Poll #1

What is your desired profit margin for 2024?



Relationships are what make our business successful and the same goes with our team.

This being said, to create a high-touch, high value client experience, that is also profitable, we need to leverage automation to the max.

Turn the experience outward toward our clients to make sure that it meets their expectations.



Efficiency and automation are daily practices, we have to be efficient to survive, client experience is everything.

Automation and the tech stack are constantly evolving, like breathing.

Tuning Up Your Tech

- AI is already in many solutions, now we have the opportunity to work smarter and scale rather than holding on to old ways of doing things.
- Set it right now until there is something better.
- Switch checklist to migrate to new options.



Poll #2

Do you plan to add new AI tools in 2024?



Work Smarter Not Harder

- We use Scribe – only 10 minutes to do an onboarding video.
- Radical efficiency is in our DNA.
- What process is broken...work smarter not harder.

Lessons Learned

- Team overworks client.
- Leads to overhead issues and employee burnout.
- Scope creep is real.

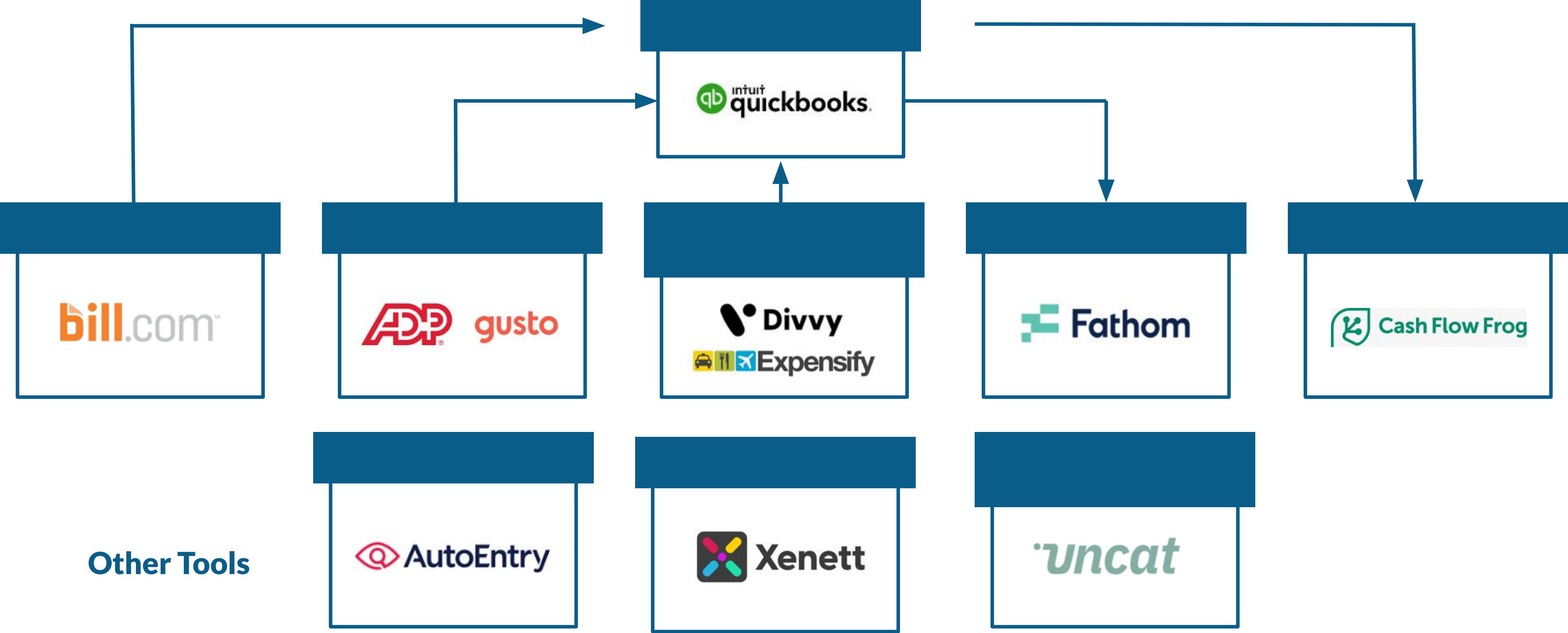


FAIL



AI USE & TECH STACK AT BRIGADE

Client App Stack



Brigade App Stack



Your team and technology is the success and/or the failure of your firm.

- Find out what motivates your team, it is not always money.
- Automate or die!
- Realize that your firm and the tools you use to run it are always going to change.



I have my team, my tech stack, now what?

- Technology by objective – implementation and budgeting.
- Technology ROI – make sure you monitor it.
- Make sure roles and expectations are crystal clear.
- Team is on the front line help them to work smarter.



Poll #3

What do you think is the most challenging part of upgrading technology?

Change Management for Tech

- Expect hiccups.
- Expect things will take longer than first thought.
- Be transparent and open to feedback.
- Be aware of when you need to add another team member and what that role is – not necessarily an accounting team member.



Poll #4

How many new clients do you plan to add for CAS in 2024?

CONCLUSION

- Evaluate the delivery of your services and the talent you need to support the delivery.
- Determine appropriate technologies to support your virtual firm and virtual team.
- Focus on optimizing the use of AI such as Botkeeper to scale your firm.





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THANK YOU!

