

# THE BOTKEEPER JOURNEY

## – EMPOWERING YOUR FUTURE

ENRICO PALMERINO, FOUNDER & CEO AT BOTKEEPER

SEPTEMBER 22, 2023

# A DREAM REALIZED...

Eight years of dedication, vision, and growth.



AI UNCHAINED, 2023

AI UNCHAINED 2023

WESTIN

DEBUT CONFERENCE. SOLD OUT VENUE. **BADASS** AUDIENCE

WESTIN



# THANK YOU.

Thank you for being on this journey with us

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# THE GLOW UP

Started with a video for Mom.  
#SquadGoals, am I right?

**LET'S MAKE HISTORY.**

**SAY...“FREAK IN THE  
BALANCE SHEETS!!”**

AI UNCHAINED, 2023



**AI UNCHAINED**  
Accounting. Intelligence. No boundaries. No limits.

# INNOVATORS IN ACTION

Pushing Boundaries. Pioneering Change.



# REVOLUTIONIZING ACCOUNTING

## DESKTOP DAYS

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8 years back, just a hosted QB desktop

## SOFTWARE SURGE

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QBO's rise & Xero's U.S. entry.

## CAS EVOLUTION

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Once 'necessary evil' to now a revenue champ



# REVOLUTIONIZING ACCOUNTING

## AI'S TRANSITION

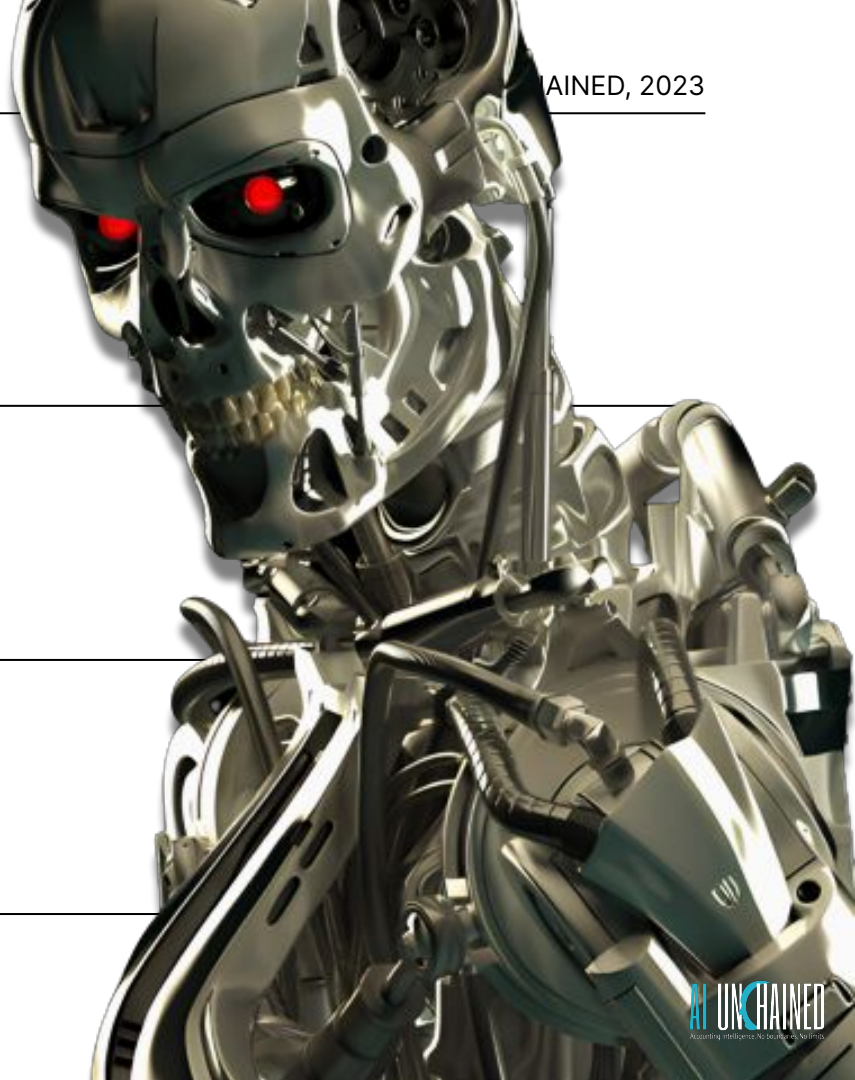
From Skynet fears to an essential tool

## GLOBAL SHIFT

Outsourcing & offshoring journey  
from taboo to standard.

## REMOTE REVOLUTION

Offices yesterday. Anywhere today





# CULTIVATING CHANGE

The Rise of Accounting

# JUST A FEW EXAMPLES...

## TOWERBROOK

TowerBrook invests millions in EisnerAmper.

## PARTHENON

Parthenon backs Cherry Bekaert

## JEFF BEZOS

Bezos invests \$100M in Pilot.

## NEW MOUNTAIN

New Mountain supports Citrin Cooperman.

## LIGHTYEAR

Lightyear funds Schellman & Co.

## CREATIVE PLANNING

Creative Planning acquires BerganKDV.

## STEVE COHEN

Steve Cohen and Paychex Founder Tom Golisano funnel \$85M into Botkeeper.

## TOM GOLISANO

LIGHTYEAR CAPITAL



TOWERBROOK





# WHY NOW?



It's because they finally see what you have seen all along.  
An age-old industry has been going through an  
evolution—or what Botkeeper likes to call a Revolution.

# AND THEY WANT IN ON IT.

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They recognize that accounting is the only thing every  
business needs. Everything else is optional — but not  
accounting.





# CERTAINTIES OF LIFE

Death, Taxes, and the Unwavering CPA

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# THE ACCOUNTING PROFESSION HAS EXPLODED – IN A GOOD WAY

**544B**

ACCOUNTING SERVICES' VALUE IN 2020

**740B**

PROJECTED VALUE BY 2025

**40%**

BUSINESSES OUTSOURCING TODAY

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A foundation for rapid growth.

A 50% surge in just half a decade!

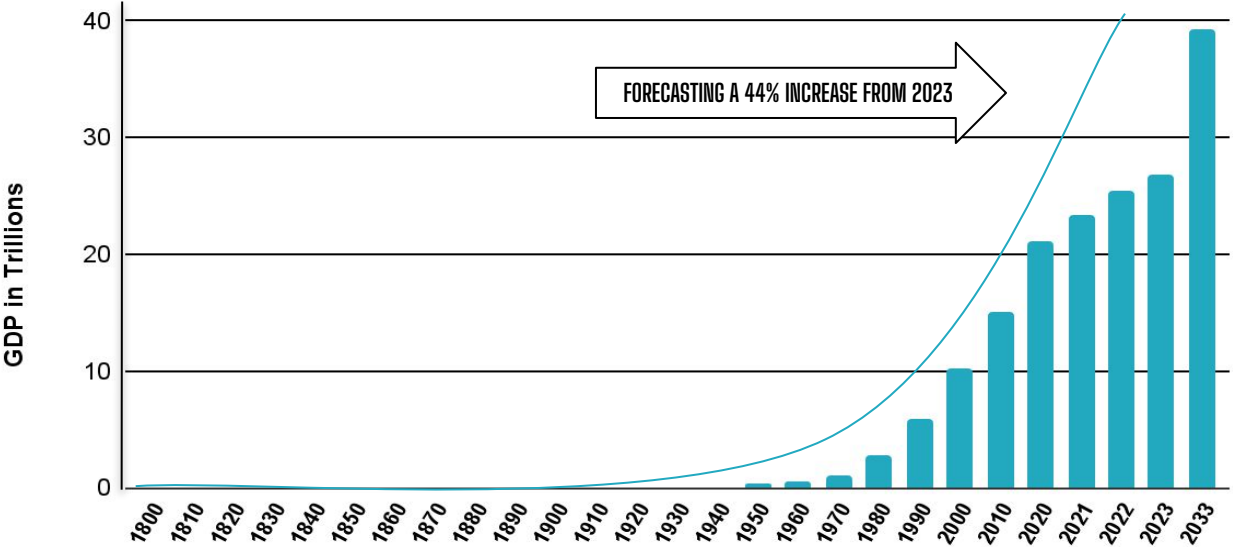
A significant rise from a decade ago.



# WHAT'S NEXT?

What is the future of accounting?

# GDP IN THE US SINCE 1800



In just a few years, massive investments have flooded into AI, with projections suggesting an addition of \$12.4 Trillion to the US GDP—a 44% increase—all within the next 6 years.

● **\$12.4 TRILLION**

Is expected to be unlocked due to massive tech advances.

● **44% INCREASE**

Is the expected leap over previous revolutions in economic growth

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# YOU!

The prime beneficiary of this revolution.

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# OUR VISION

01

## VISION OF VIRTUAL

We believed in the power of virtual teams, resisting the pull to Silicon Valley.

02

## APPS ERA: OVERLOAD

We foresaw app fatigue as everyone juggled multiple platforms; today, many feel overwhelmed with 8+ apps.

03

## CRISIS CONTROL

Predicted the accountant apocalypse; deployed AI as the superhero cape. Not all heroes wear capes, some build them!

04

## TEACH, NOT PREACH

Telling accountants to just 'adapt' was never our style. Instead, we built the roadmap with tech.



# OUR VISION

## APPS ERA: OVERLOAD

We foresaw app fatigue as everyone

## TEACH, NOT PREACH

Telling accountants to just 'adapt' style. Instead, we ap with tech.

**Proudly 100% virtual across 4 continents, 6 countries, and 40 states, pioneering the now-standard of global workforces.**

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# OUR PROCESS

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# OUR VISION

APPS ERA: OVERLOAD

TEACH, NOT PREACH

Because why juggle when you can seamlessly integrate? **We built the ultimate CAS platform for effortless accounting.**

just 'adapt'  
stead, we  
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We predicted the surge in new businesses would surpass the human capability to service them in accounting.

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# OUR VISION

APPS ERA: OVERLOAD

TEACH, NOT PREACH

Our vision has always been clear: **Empowering accountants, not replacing them.** Our CAS platform transforms tedious tasks into seamless operations, letting professionals focus on what matters most."

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Instead of merely preaching change, we provided the tools for a **smooth transition** into advisory roles.

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# REFLECTING ON OUR JOURNEY



## VISION TO REALITY:

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Your feedback transformed early doubts into tangible growth.



## DIVERSE IMPACT:

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Serving 8500+ businesses, thanks to 250 supportive firms.



## AI BENEFITS:

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Saving time, boosting revenue, elevating profitability.



## THANK YOU:

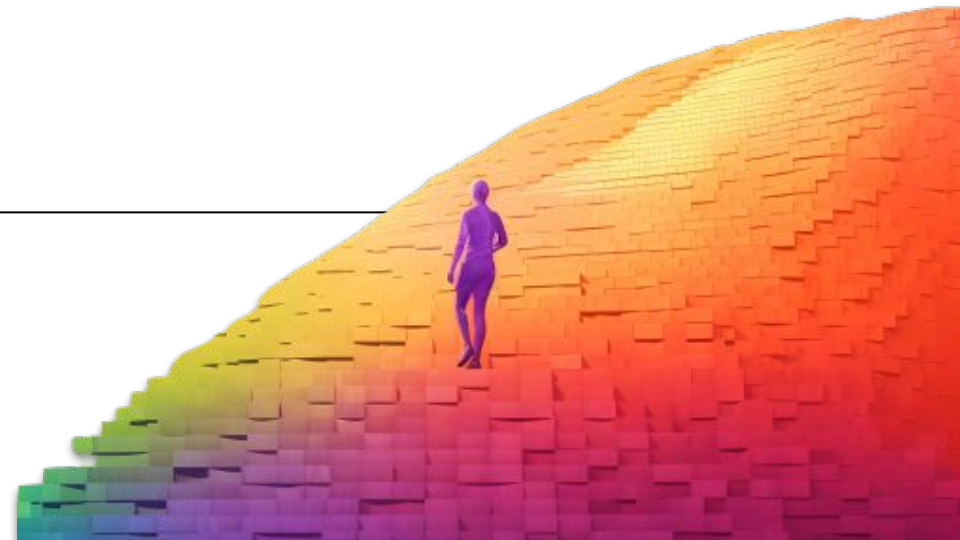
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For guiding, believing, and shaping Botkeeper's journey.

# THE ROAD AHEAD

Defining the Next Chapter.

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# EMPOWERING MODERN ADVISORY



## STRATEGIC

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Elevating our Advanced package with forecasting, budgeting, and planning.



## COST-EFFECTIVE

Delivering more, without adding a dime to your costs.



## COLLABORATIVE

Teaming up with an industry trailblazer for this transformative journey.







# MARTIN ZYCH

CEO & Co-Founder at Jirav



# JOIN OUR EXCLUSIVE PRODUCT DEEP DIVE WEBINAR

With your hosts Enrico Palmerino and Martin Zych

- December 14th, 12 PM ET
- [jirav.com/botkeeper](https://jirav.com/botkeeper)



Enrico Palmerino, CEO, Founder



Martin Zych, CEO, Founder





"On the road to innovation, there's no rest stop."

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— AN AI CHATBOT 🤪

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# BEYOND LEDGERS: THE FUTURE BLUEPRINT

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## AI-DRIVEN FINANCIAL REVIEWS

Precision meets efficiency.

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## EMPOWERING ACCOUNTANTS

Transition seamlessly to trusted advisors.

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## STAYING AHEAD


Embracing change without the overnight shift.

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## THE GAME-CHANGING ALLIANCE

Teaming up with...





Google



# TARA SEPPA

National Director, Startups & Digital Natives





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# GOOGLE & BOTKEEPER: A **VISIONARY** COLLABORATION

## PIONEERING **INNOVATORS**

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Google's legacy in search, AI, and cloud services meets Botkeeper's accounting expertise.

## ENHANCED **DATA INSIGHTS**

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Utilizing Google's knowledge graph and Doc AI to extract and augment data more accurately.

## **GENERATIVE AI & VERTEX** INTEGRATION

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Deep insights, powered by Google's LLMs, ensuring unparalleled data depth and clarity.

## TRUSTED & **SECURE**

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Operations anchored within Google's world-class data centers, ensuring data integrity and security.

# CHEERS TO TARA AND GOOGLE!

Celebrating Insights, Innovations, and our Dynamic Collaboration!



National Director, Startups & Digital Natives

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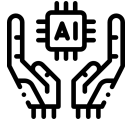
# BEYOND BOUNDARIES

Vision to Validation

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# TOMORROW, TODAY



## AI EMPOWERMENT

Accountants wielding the best of AI and reshaping client experiences.



## RAPID ONBOARDING

Reduce client onboarding from hours to just 5 minutes with Botkeeper.



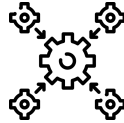
## AUTONOMOUS SCHEDULES

Schedules auto-created and synced to the GL, leaving Excel in the past.



## DIRECT CONTROL

From human-led to tech-driven. Adjust, train, and monitor. Opt for Basic or Advanced when needed.



## SEAMLESS INTEGRATION

Effortlessly connect Botkeeper with your go-to apps, opening the doors to unlimited automation



## EFFORTLESS RECONCILIATIONS

Month-end reviews automated, with only crucial variances flagged for your attention.

# THE FUTURE OF ACCOUNTING

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Infinite Possibilities... Infinite Potential... Infinite Impact.



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# INFINITE IS MORE THAN JUST A PRODUCT...

## ENHANCED AUTONOMY

Tailor solutions with Botkeeper Infinite—your vision, your tools.

## CLIENT-CENTRIC FLEXIBILITY

Personalized services for every unique client demand

## ENABLE FUTURE SUCCESS

Automation-powered advisory, optimized for tomorrow's demands

## EMPOWERING FIRMS OF ALL SIZES

From startups to established entities, harness the power of Infinite.



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# INFINITE DISTINCTION

## TECH-FIRST JOURNEY

Blending advanced solutions with outsourced services seamlessly

## SEAMLESS ONBOARDING

Onboard with ease, using Infinite's intuitive interface

## DATA-DRIVEN INSIGHTS

Unparalleled data insights to empower strategic financial decision-making.

## GROUNDBREAKING AI

Redefine precision with Infinite's next-gen machine learning models.

## HOLISTIC CLIENT ENGAGEMENT

Offer comprehensive services, marrying financial insights with task management.

## CONTINUOUS INNOVATION

Stay ahead with Infinite's relentless pursuit of future-proofed solutions.

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# PEEKING BEYOND THE HORIZON: BOTKEEPER IN 2024

## **INTEGRATION EXPANSION:**

Integrating more General Ledger systems, providing expanded compatibility.

## **ALLOCATION AUTOMATION:**

Automating split allocations – whether it's expenses, intercompany transfers, or interest and principal divisions.

## **ONE-CLICK ACCESS:**

Secure Quicklinks for clients, simplifying access to tasks without the regular login process.

## **BOTKEEPER COMMUNITY:**

A dedicated space for users to connect, share experiences, and discuss best practices.

## **ML CUSTOMIZATION:**

Configure machine learning models to suit your firm's preferences, from transaction confidence thresholds to handling instructions.

## **GENAI PREDICTIONS:**

Enhanced forecasting using generative AI, especially for complex transaction categorizations.

## **VARIANCE ALERTS**

Real-time notifications for discrepancies, ensuring you're always informed of any anomalies.

## **INDUSTRY-SPECIFIC MODELS:**

Tailoring machine learning for unique industry nuances. Optimize categorization and processing based on specific industry practices.

## **ADVANCED REPORTING:**

Offering deeper insights with enhanced reporting features.

## **UI REFRESH**

An updated user interface for an improved, intuitive user experience.

## **BOTKEEPER UNIVERSITY:**

Comprehensive educational resources and training, setting the standard in automated accounting.

# WHAT DOES THIS MEAN FOR YOU?

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As we step into the future, Botkeeper is evolving to serve you better. Starting next year, we're diversifying our offerings to match your unique needs.

# ONE FLAVOR, YOUR CHOICE OF TOPPINGS



## INFINITE

- Tech-only experience
- For the do-it-yourself enthusiasts
- Ideal for small firms or those aiming for rapid Botkeeper adoption and scalability



## BASIC

- Tech+ BASIC SERVICES
- Added assistance for those in need
- Perfect for firms seeking more time savings and scaling support



## ADVANCED

- Tech+ ADVANCED SERVICES
- Our premium offering for comprehensive needs
- Maximizing time benefits, and now featuring Jirav!



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# YOUR JOURNEY, YOUR CHOICE

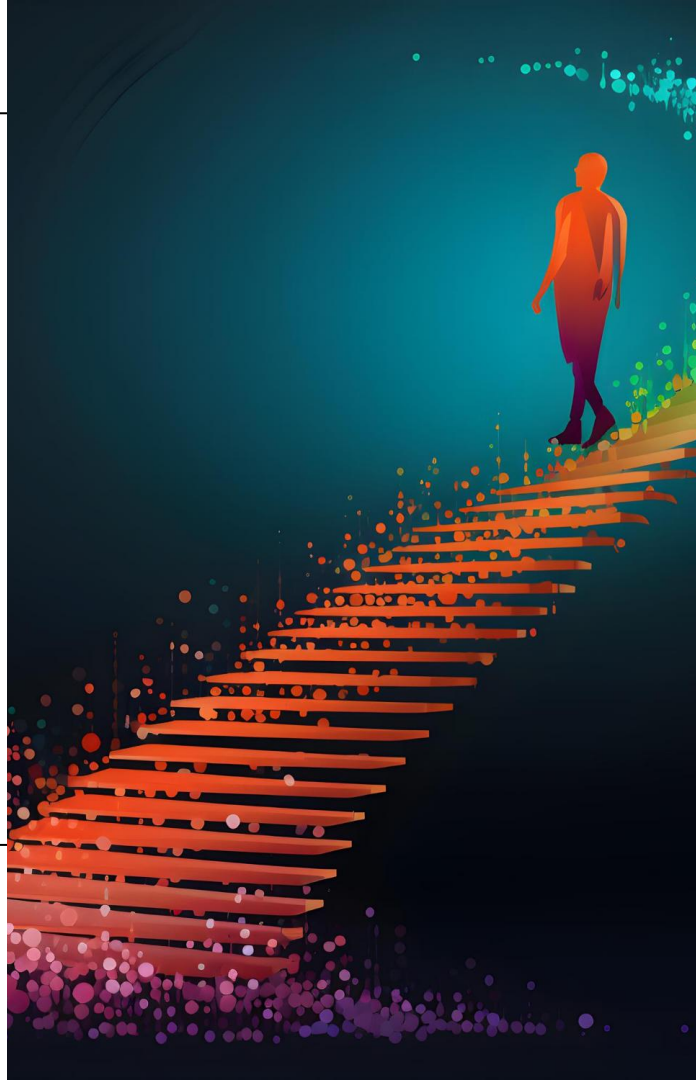
Empowering Your Unique Path

**AUTONOMY:** Own your strategies and solutions.

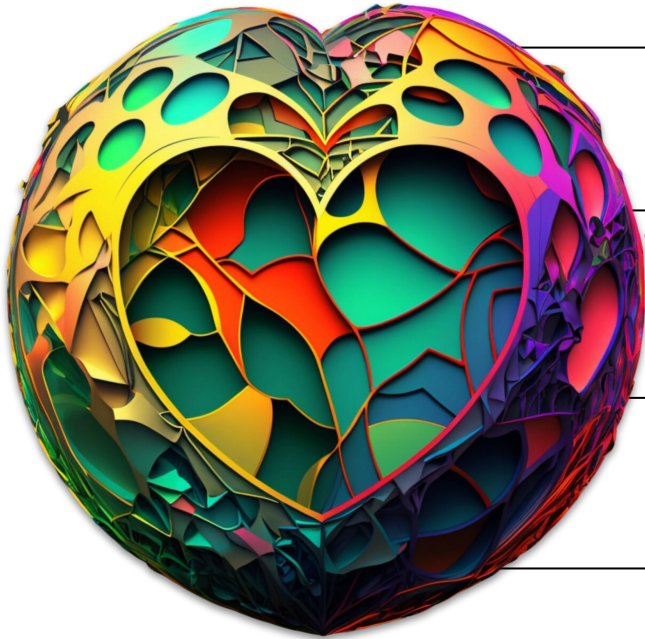
**FLEXIBILITY:** Embrace the ebb and flow of growth.

**EMPOWERMENT:** Harness cutting-edge technology confidently.

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# A HEARTFELT THANKS



## PARTNERS & SPONSORS

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Your unwavering support has been the backbone of this conference.

## TALENTED SPEAKERS

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Your expertise and insights have enriched our event.

## OUR DEDICATED TEAM

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For ensuring every detail was flawlessly executed.

## ATTENDEES

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For your engagement, enthusiasm, and commitment to innovation.



# 10 CLIENTS, FREE FOR ONE YEAR.

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Get on our waitlist today and qualify for our special AI Unchained offering. No catch. No strings.



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# THANK YOU

Because epic conferences need epic attendees.

