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The
'APPY HOUR
with Liz & Heather
www.theappyhour.com

Power Panel: Automate Your Client On-boarding

With sponsor:

 PRACTICE Ignition

Your Host



Liz Scott



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Agenda

- 🍷 Welcome!
- 🍷 Power Panel: Automating Your Client Onboarding
- 🍷 Let's raise a toast! This month's app sponsor:  **PRACTICE Ignition**
- 🍷 Preview of our next episode!



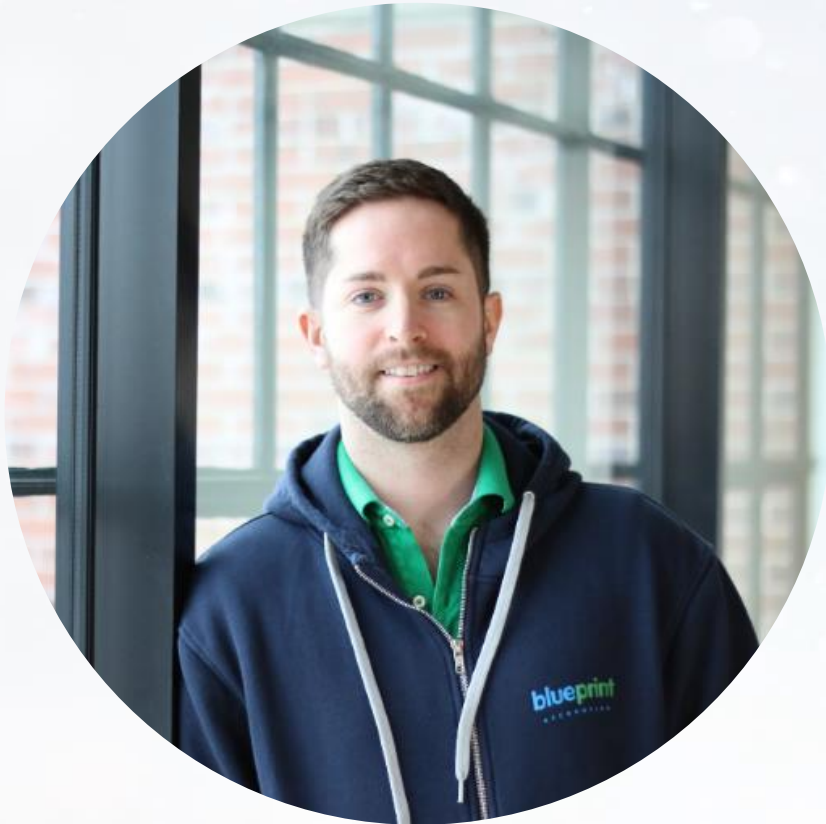
Twitter: @hsatterley

Heather D Satterley, CPA

Satterley Training & Consulting

Backoffice Ally





Brian Clare, CPA, CEO

Blueprint Accounting, Inc

blueprint
A C C O U N T I N G

Twitter: @blueprintbrian



Twitter: @lancejd1

Josh Lance, CPA

Founder



LANCE CPA GROUP

the small firm for big dreams

Head of Accounting



PRACTICE Ignition

The background features a large, abstract graphic composed of several concentric, slightly irregular rings. The rings on the left are in shades of blue, while the rings on the right transition into shades of green. The overall effect is a soft, organic frame around the central text.

**Let's Start the
Conversation...**



What do we mean by client onboarding?

The tasks and technology necessary to begin working on a client engagement.





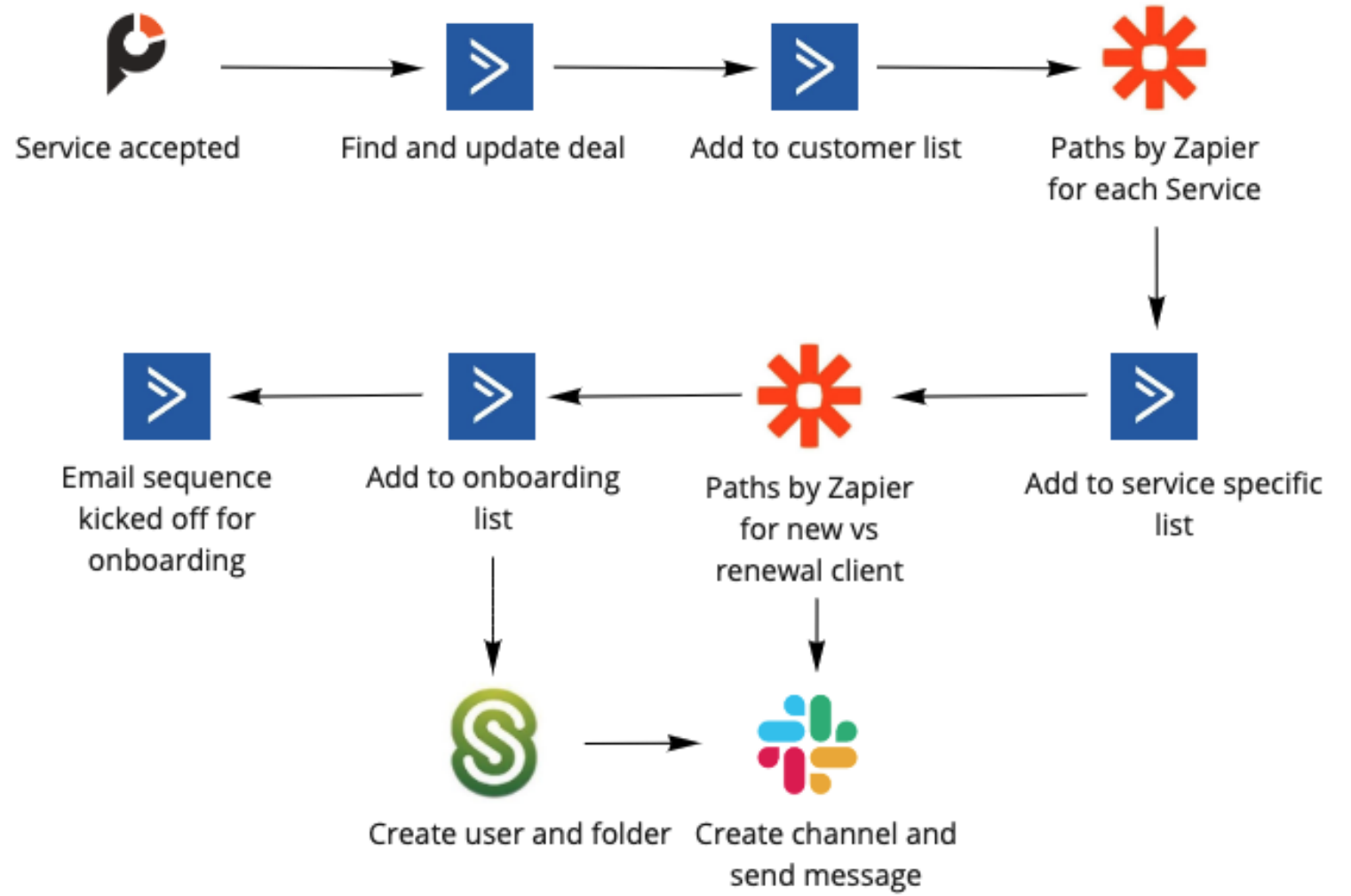
**Tech Stack
or
Client Experience?**



Brian Clare – Blueprint Accounting



Brian's Process



Josh Lance – Lance CPA Group



Hootsuite™

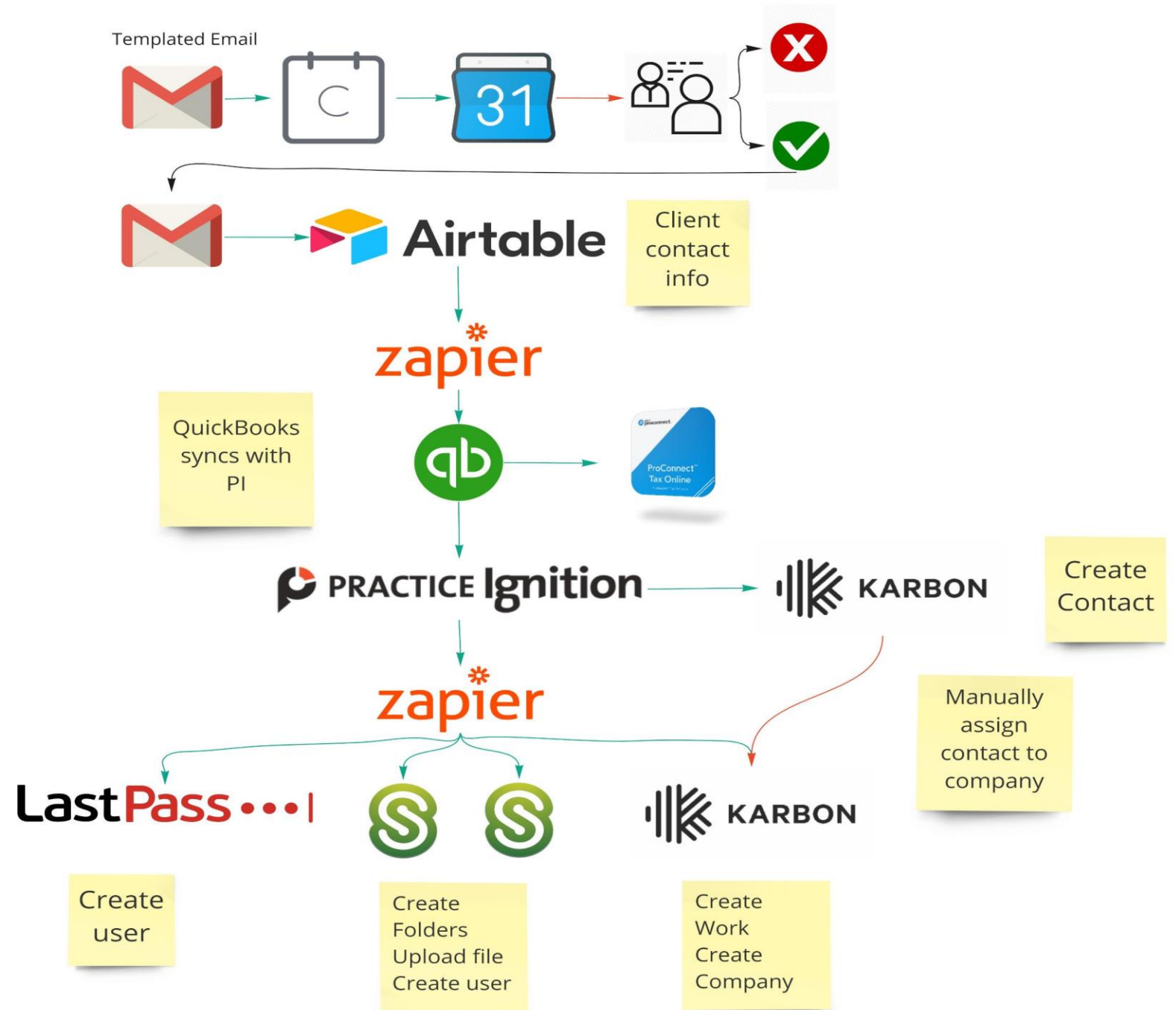


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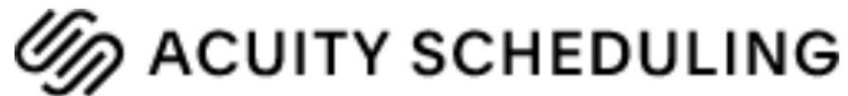
Heather Satterley– Backoffice Ally



Heather's Process Backoffice Ally



Heather Satterley- Satterley Training & Consulting



G Suite



LastPass...



Airtable

The background features a light blue gradient on the left and a light green gradient on the right, separated by a vertical line. On the left side, there are several overlapping, wavy, light blue shapes that resemble stylized clouds or water. On the right side, there are similar wavy shapes in a light green color.

Why Practice Ignition?

What is the cost benefit to your firm by using Practice Ignition?



Ignition Fuel Martini

Recipe

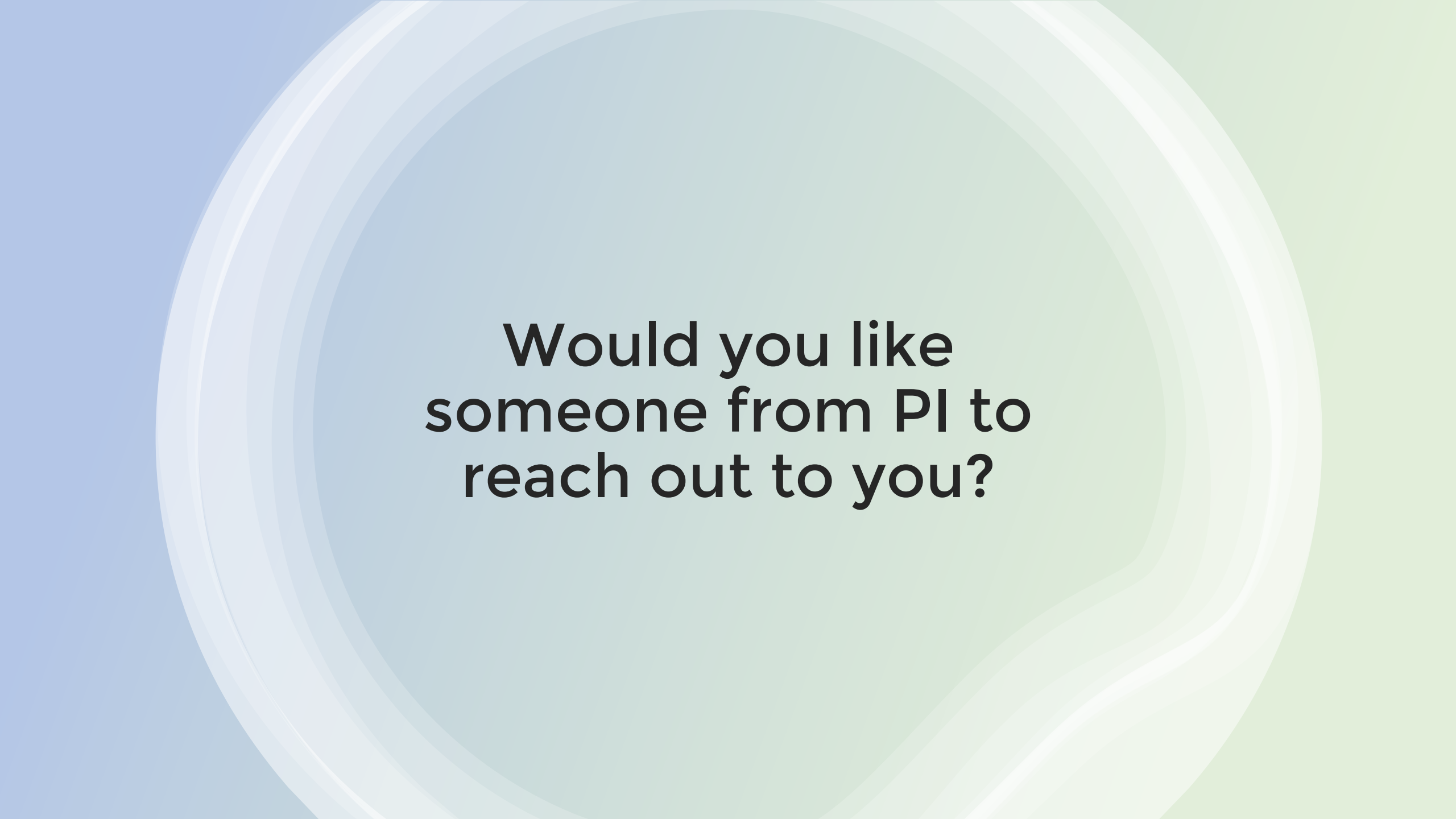
- 🍸 2 oz Vodka
- 🍸 ½ oz simple syrup
- 🍸 ½ oz coffee
- 🍸 1 oz freshly brewed espresso

Directions

- 🍸 Add all ingredients into shaker with ice and strain into chilled glass
- 🍸 Garish with coffee beans

 **PRACTICE Ignition**

DEMO

The background features a series of concentric circles that create a tunnel-like effect, receding towards the right. The color gradient transitions from a light blue on the left to a light green on the right. The text is centered within this graphic.

**Would you like
someone from PI to
reach out to you?**



Today's Specials

🍷 50% Off Professional Plan for first 3 months

🍷 New customers only

🍷 <https://bit.ly/PI-AppyHour>

Next Wednesday, June 17th Josh and Heather
are teaming up to offer a free webinar:

Top 10 Zapier Hacks for Cloud Accountants and Bookkeepers

Register here: <https://bit.ly/Zapier-PI>



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Explore Sales Tax Nexus for eCommerce Businesses

With Sponsor:



June 23, 2020 4:00 PM EST

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Upcoming Episodes

- June 23 - Webgility for eCommerce
- July 14 - FundBox
- July 21 – A/R Collect
- August 11 – Melio Payments

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