



# Tech-Enabled Service Strategies for Accountants

**WOODARD®**

# Learning Objectives

- Identify the role of technology in enhancing accounting services.
- Describe the benefits of outsourcing complex tasks to top-tier technology partners.
- Explain actionable strategies to build partnerships that drive business growth.



# What are Tech-Enabled Services?



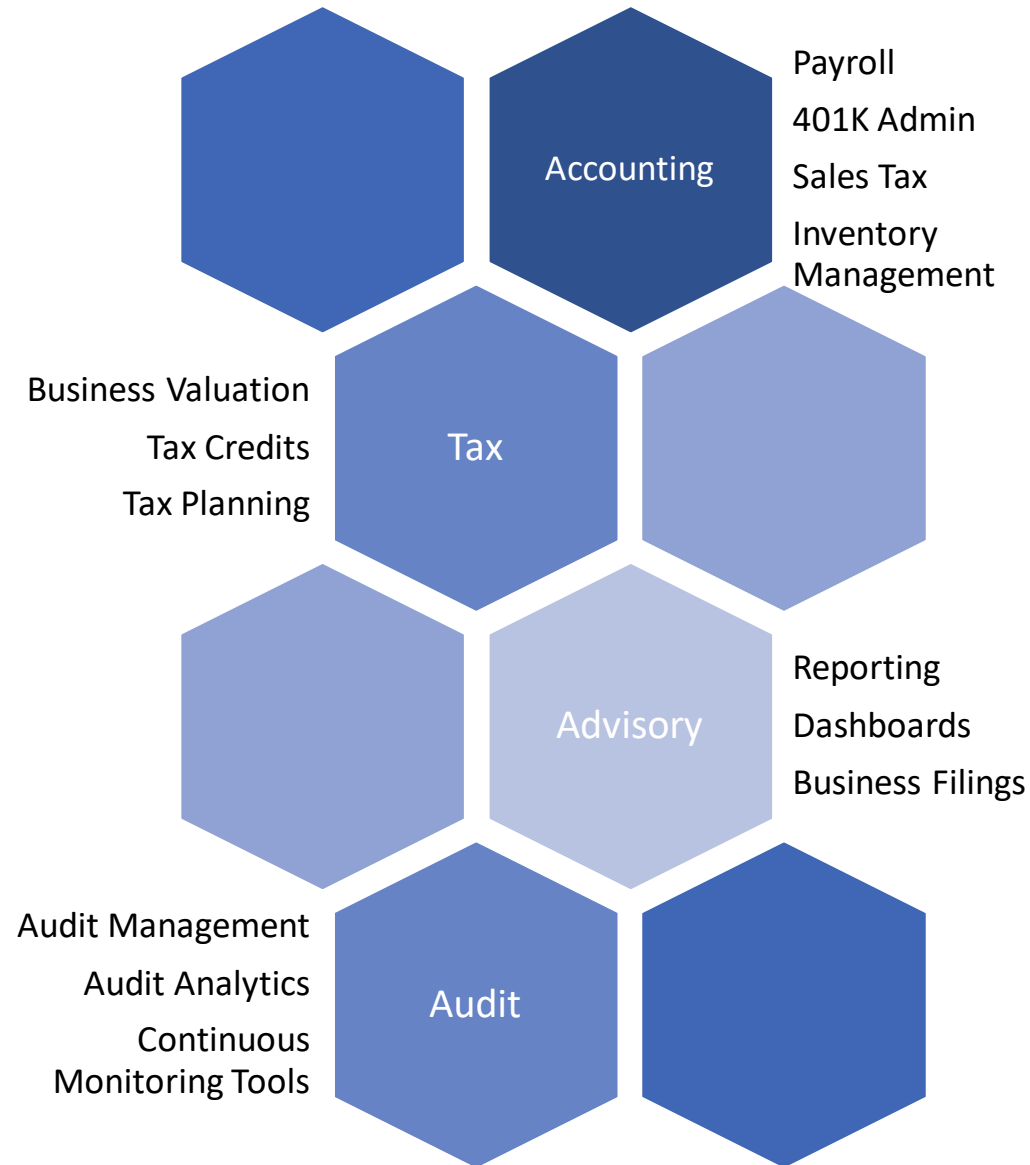
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# What are tech-enabled services?

Technology-enabled services are services you provide directly to your clients through partnerships with technology vendors.



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# Examples of tech-enabled services

# Examples of Tech-enabled Service Providers

Payroll	Business Filings	FP&A	401K / Insurance / HR	Sales Tax	Audit	Tax
<ul style="list-style-type: none"><li>• ADP</li><li>• OnPay</li><li>• Gusto</li><li>• Justworks</li></ul>	<ul style="list-style-type: none"><li>• CorpNet</li><li>• BizFilings</li><li>• Northwest Registered Agent</li></ul>	<ul style="list-style-type: none"><li>• Jirav</li><li>• PlanGuru</li><li>• Reach Reporting</li></ul>	<ul style="list-style-type: none"><li>• Human Interest</li><li>• ADP</li><li>• Gusto</li></ul>	<ul style="list-style-type: none"><li>• Avalara</li><li>• TaxJar</li></ul>	<ul style="list-style-type: none"><li>• CaseWare IDEA</li><li>• MindBridge AI</li></ul>	<ul style="list-style-type: none"><li>• Intuit Tax Advisor</li><li>• TaxPlanIQ</li><li>• TaxPlanner Pro</li></ul>

# Benefits of tech-enabled services

Increased  
Efficiency

Expanded  
Service  
Offerings

Improved  
Client  
Satisfaction

Revenue  
Growth

Competitive  
Advantage

Data Security  
and  
Compliance

Scalability

Access to  
Advanced  
Analytics

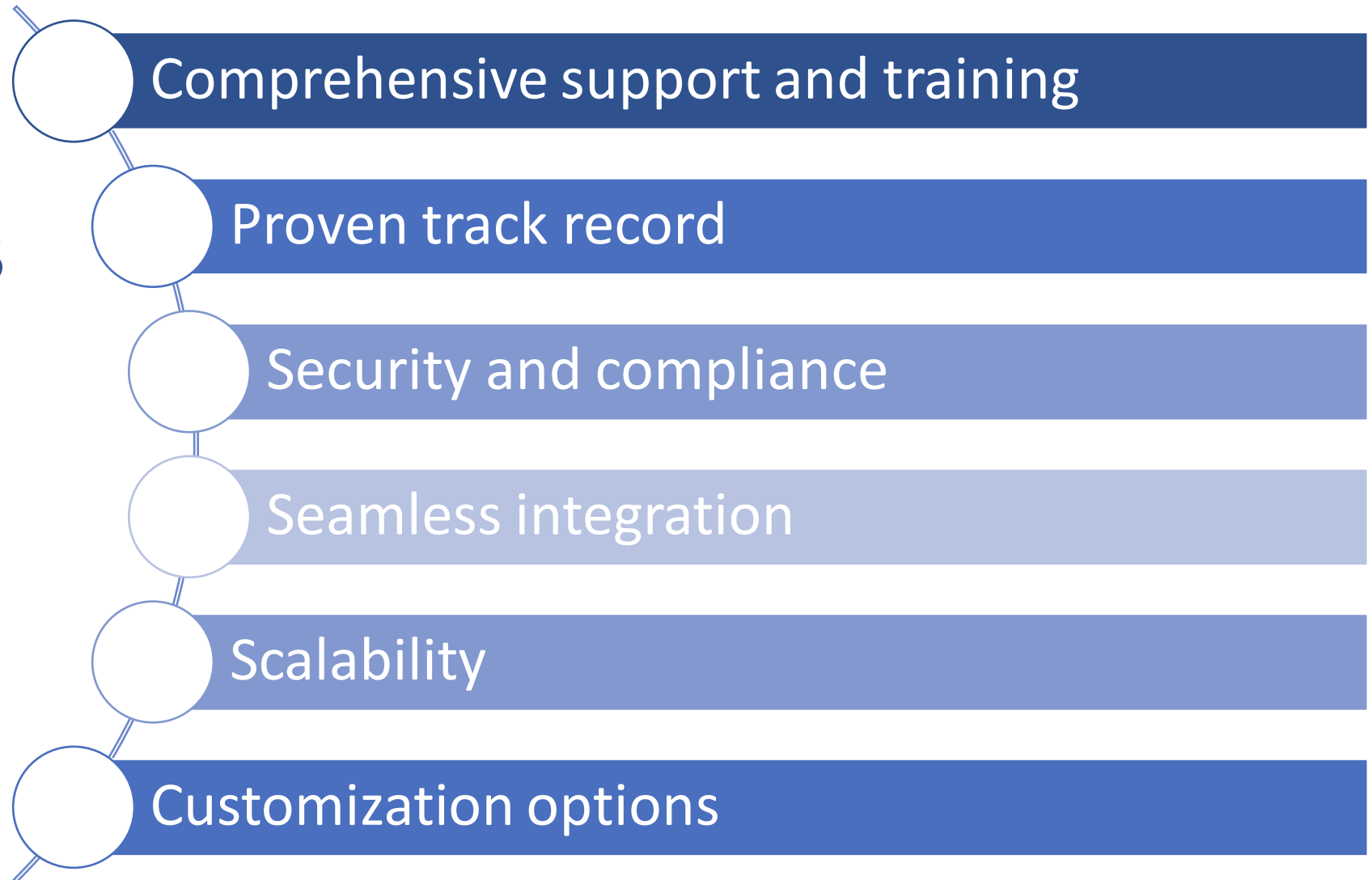
# Choose the Right Partners



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## What makes a great strategic partner?



# Financial Considerations for Choosing a Partner

- Cost analysis
- Pricing structure
- Client Advisory Services (CAS) Impact
- Compensation/benefits
- Integration with existing service offerings



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# Partner Compensation Models



Revenue  
share/commission



Referral fees



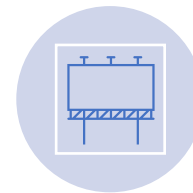
Partner discounts



Direct billing

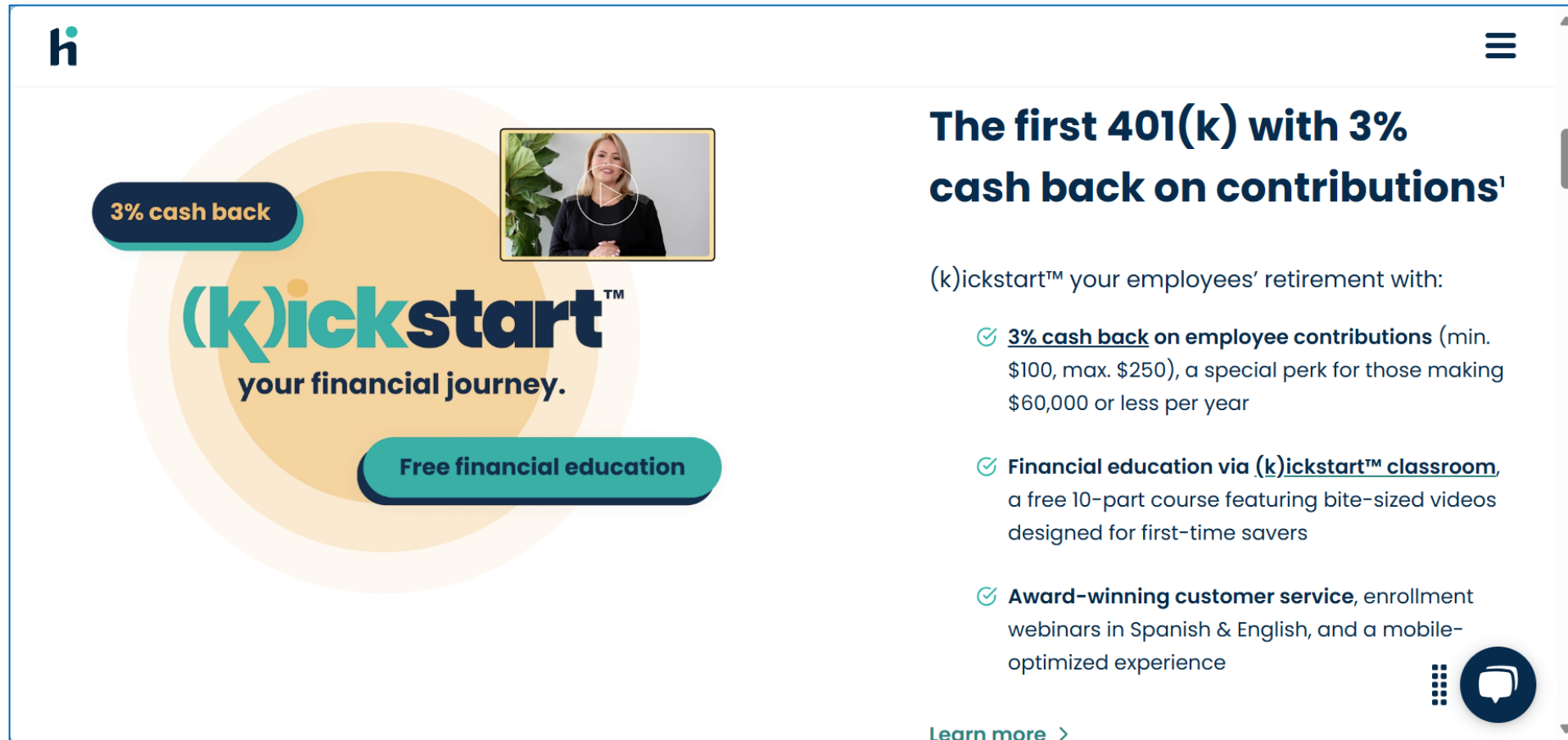


Incentive  
programs



Co-Marketing  
Contributions

# Partner Compensation Models



The screenshot displays the (k)ickstart website interface. On the left, a large orange circular graphic contains the (k)ickstart logo and the tagline "your financial journey." Above the logo is a dark blue button with "3% cash back" in orange text. Below the logo is a teal button with "Free financial education" in white text. To the right of the logo is a small video thumbnail showing a woman speaking. On the right side of the page, the headline "The first 401(k) with 3% cash back on contributions" is displayed. Below this, the text "(k)ickstart™ your employees' retirement with:" is followed by a list of three benefits, each preceded by a green checkmark icon. At the bottom right, there is a "Learn more >" link and a chat bubble icon.

**h**

**3% cash back**

**(k)ickstart™**  
your financial journey.

**Free financial education**

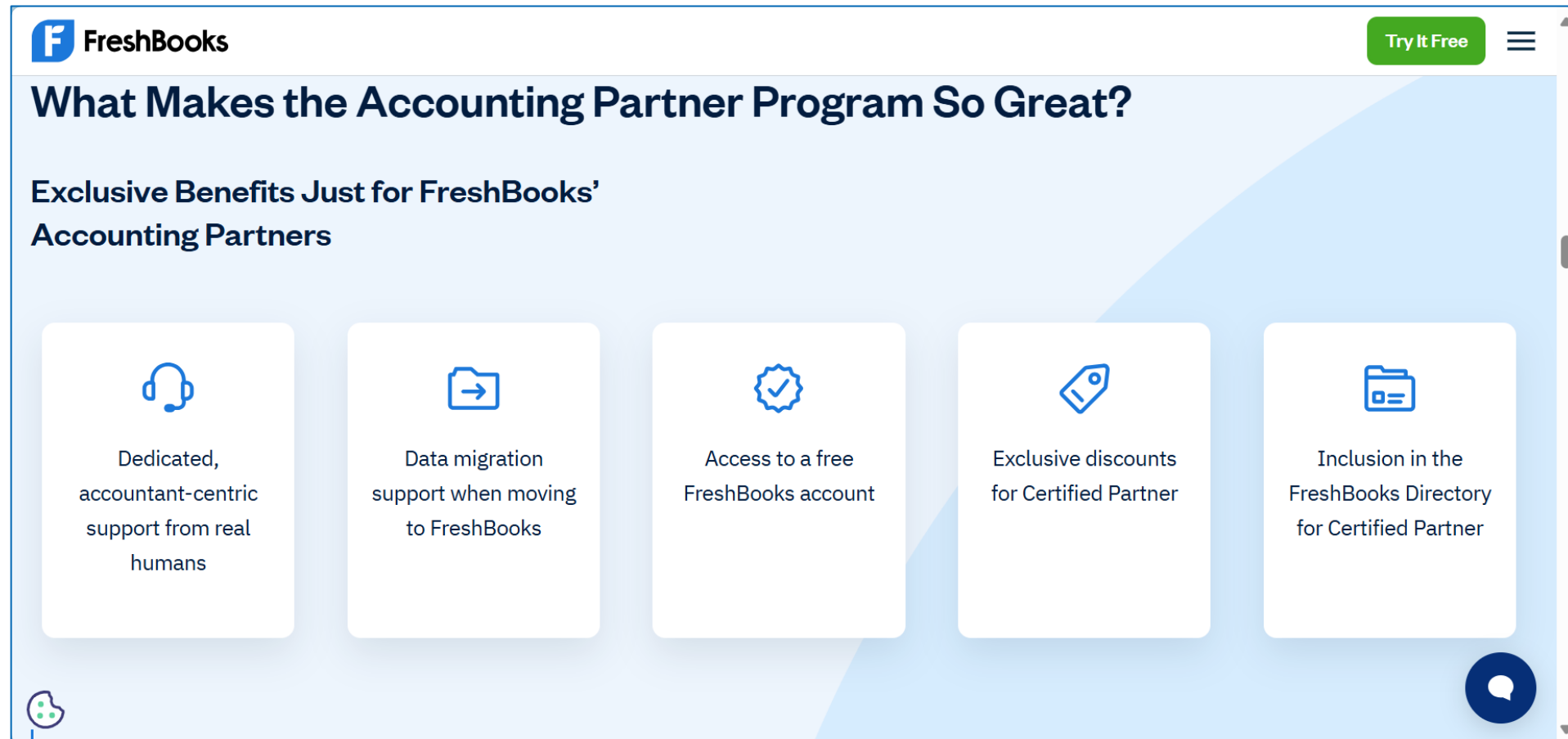
**The first 401(k) with 3% cash back on contributions¹**

(k)ickstart™ your employees' retirement with:

- ✓ **3% cash back** on employee contributions (min. \$100, max. \$250), a special perk for those making \$60,000 or less per year
- ✓ **Financial education** via (k)ickstart™ classroom, a free 10-part course featuring bite-sized videos designed for first-time savers
- ✓ **Award-winning customer service**, enrollment webinars in Spanish & English, and a mobile-optimized experience

[Learn more >](#)

# Partner Compensation Models








The screenshot displays the FreshBooks website's 'What Makes the Accounting Partner Program So Great?' section. The page features a blue header with the FreshBooks logo and a 'Try It Free' button. Below the header, the main heading is 'What Makes the Accounting Partner Program So Great?'. Underneath, a sub-heading reads 'Exclusive Benefits Just for FreshBooks' Accounting Partners'. Five white boxes, each with a blue icon, list the benefits: 1. Headset icon: 'Dedicated, accountant-centric support from real humans'. 2. Folder with arrow icon: 'Data migration support when moving to FreshBooks'. 3. Checkmark in a circle icon: 'Access to a free FreshBooks account'. 4. Tag icon: 'Exclusive discounts for Certified Partner'. 5. Folder with document icon: 'Inclusion in the FreshBooks Directory for Certified Partner'. A chat bubble icon is visible in the bottom right corner of the page.

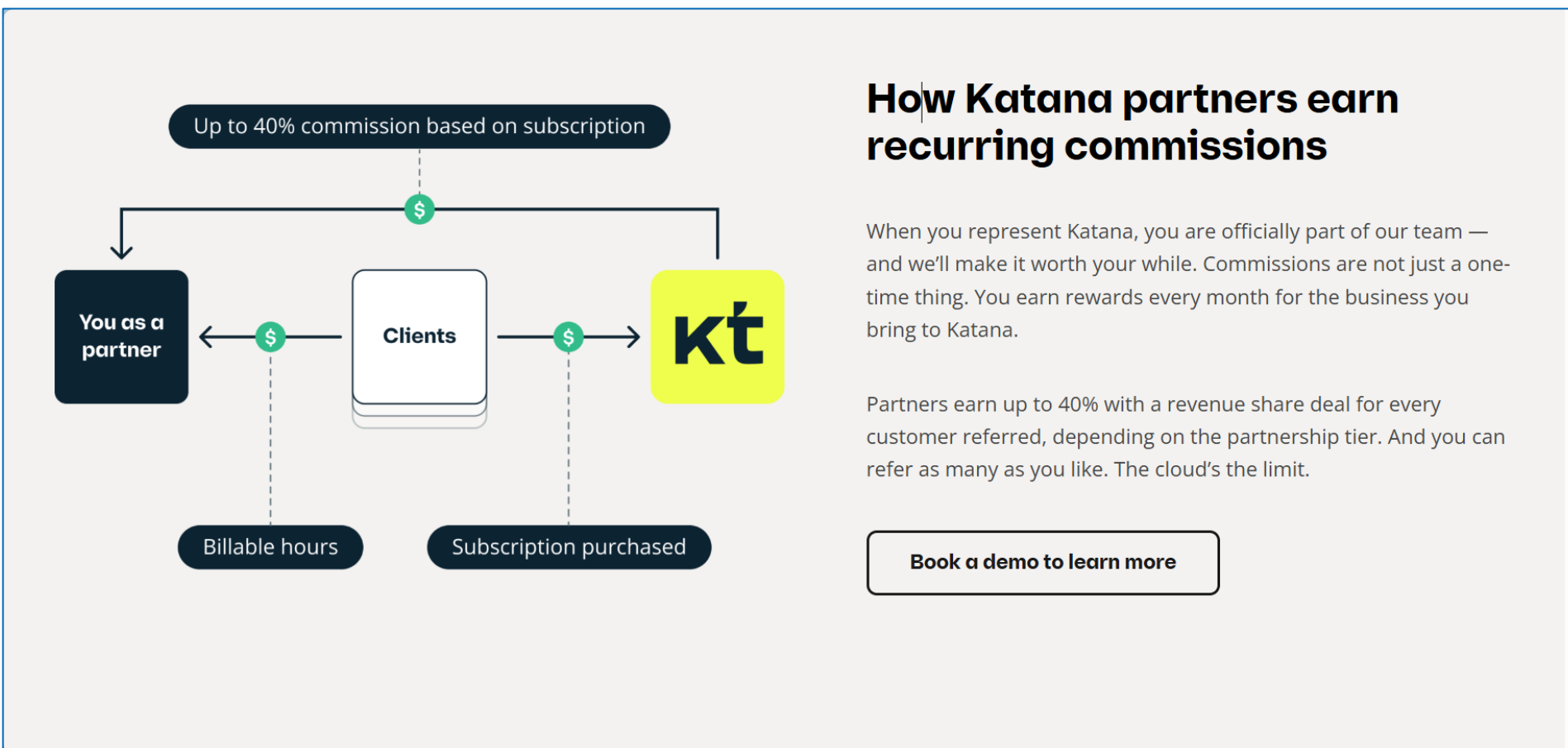
**FreshBooks** [Try It Free](#)

## What Makes the Accounting Partner Program So Great?

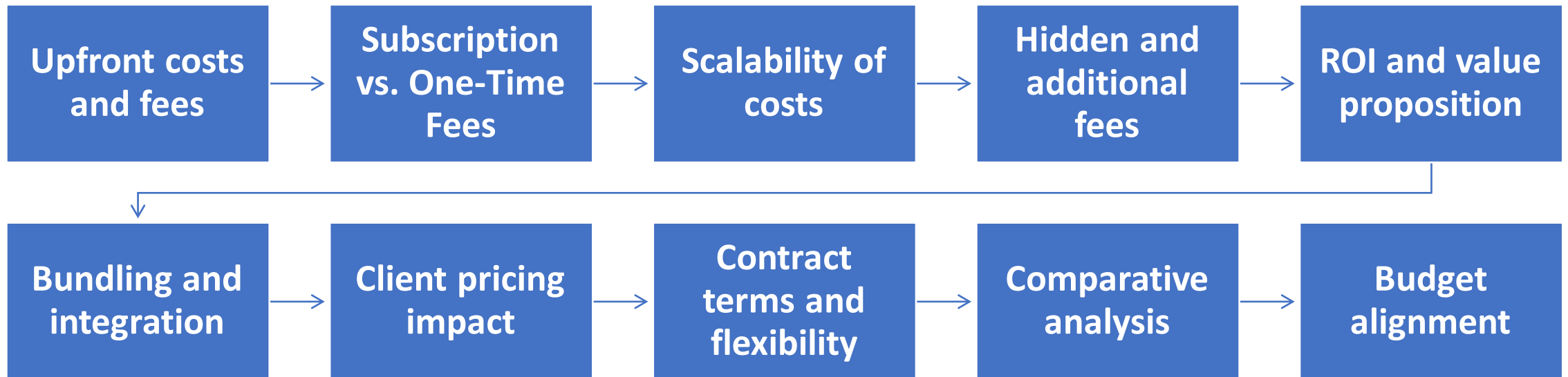
**Exclusive Benefits Just for FreshBooks' Accounting Partners**

-  Dedicated, accountant-centric support from real humans
-  Data migration support when moving to FreshBooks
-  Access to a free FreshBooks account
-  Exclusive discounts for Certified Partner
-  Inclusion in the FreshBooks Directory for Certified Partner

# Partner Compensation Models



# Pricing Tech-Enabled Services



## Other costs to consider

**Hard Costs:** Direct costs associated with purchasing and implementing the technology (e.g., software licenses, hardware).

**Soft Costs:** Indirect costs such as training, onboarding, and the time required for staff to adapt to the new system.

**Client Acquisition Costs:** Expenses incurred to acquire new clients for the tech-enabled services (e.g., marketing and sales efforts).

**Maintenance Investment:** Ongoing costs to maintain and update the technology (e.g., subscription fees, IT support).



# Implementation Strategies



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# Determine the need and opportunity

1

Evaluate  
Current Systems  
and Processes

2

Identify Gaps  
and  
Opportunities

3

Set Clear  
Objectives and  
Goals

4

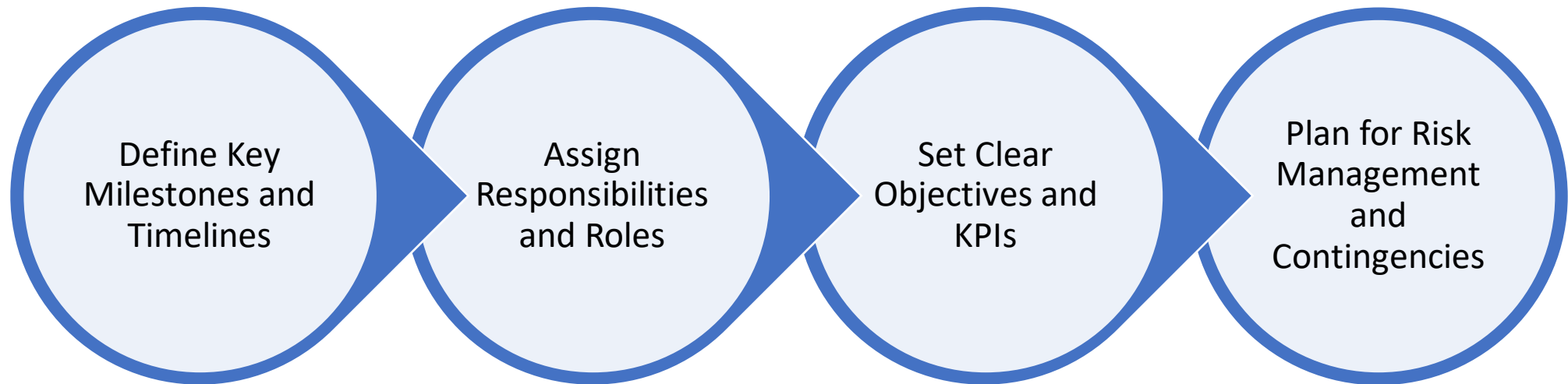
Prioritize Needs  
Based on  
Impact and  
Feasibility

# Select the right solution

- Research Available Technologies
- Evaluate Features and Capabilities
- Consider Scalability and Flexibility
- Select a Solution that Aligns with the Firm's and Clients' Needs

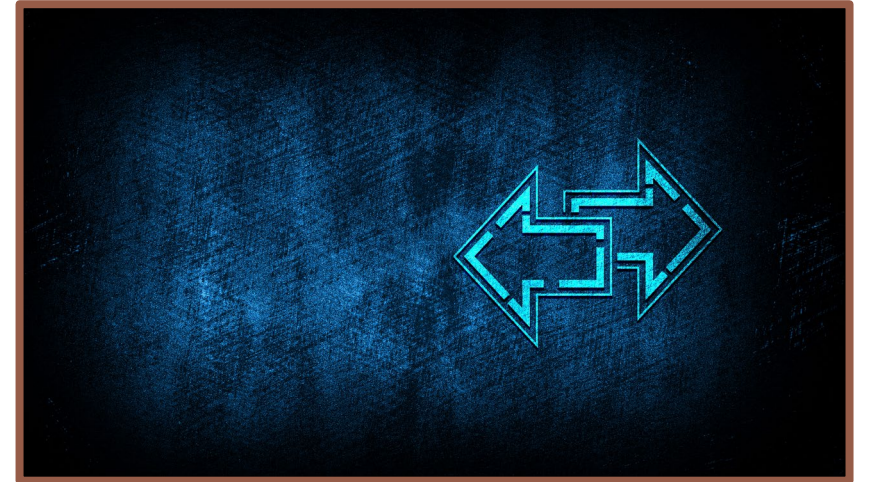


# Develop a Detailed Implementation Plan



# Data Migration and Implementation

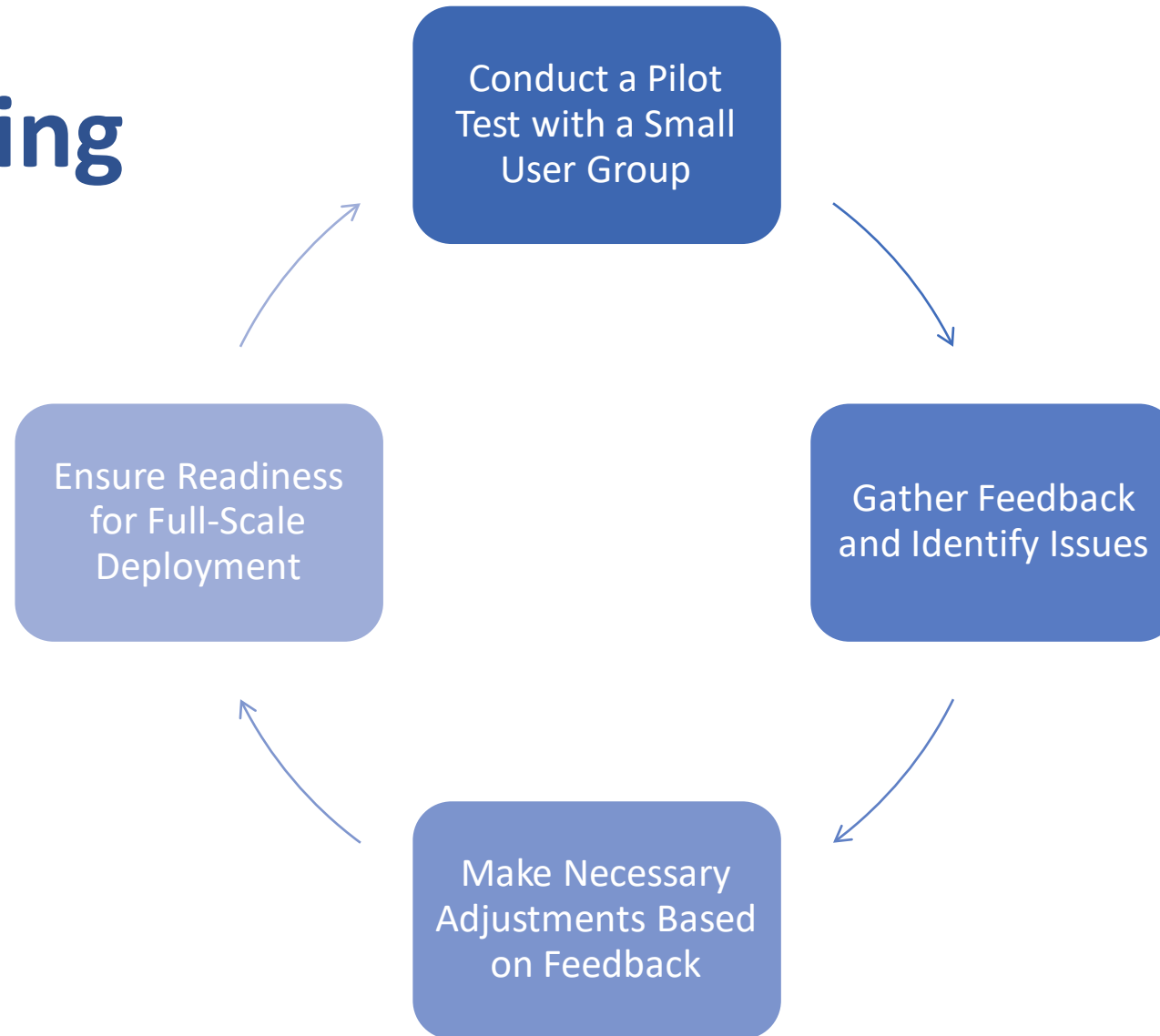
- Plan for Secure Data Migration
- Ensure Compatibility with Existing Systems
- Test Integrations Thoroughly
- Maintain Data Integrity and Security



# Training and Onboarding

- Provide Comprehensive Training for Staff
- Utilize Training Resources from the Provider
- Schedule Regular Training Sessions and Refreshers
- Encourage Hands-On Practice and Learning

# Pilot Testing



# Full Deployment

- Roll Out the Solution Firm-Wide
- Monitor the Deployment Closely
- Address Any Issues Promptly
- Communicate Progress and Successes





# Continuous Improvement and Support



REGULARLY REVIEW AND  
OPTIMIZE PROCESSES



PROVIDE ONGOING SUPPORT  
AND TRAINING



COLLECT FEEDBACK FOR  
CONTINUOUS IMPROVEMENT



STAY UPDATED WITH NEW  
FEATURES AND UPDATES

# Measuring Success

- Track KPIs and Performance Metrics
- Evaluate the Impact on Efficiency and Revenue
- Measure Client Satisfaction and Retention
- Adjust Strategies Based on Results



## Recap

- Opportunity exists to expand service offerings by partnering with top-tier technology providers
- Choose services that align with your existing service offerings
- Consider costs, compensation, and pricing model
- Carefully plan and execute your implementation



## About Human Interest

- Human Interest is an affordable, full-service 401(k) and 403(b) provider that seeks to make it easy for small and medium-sized businesses to assist their employees with retirement investing.
- Founded in 2015 and based in San Francisco.
- Provides "no-touch" integrations with 500+ payroll providers.
- Partners with accounting professionals to help their clients save with an automated, easy-to-use retirement provider



[www.humaninterest.com](http://www.humaninterest.com)



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