

# Transforming Your Finance Function

## Dopkins Client Accounting & Advisory Solution (CAAS) Team

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# In this presentation: Building a Path to a Better Way

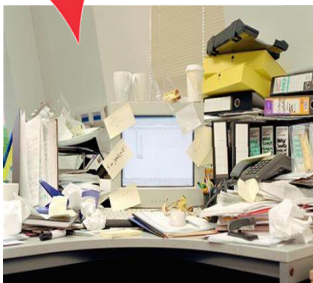
## *A pathway to success*



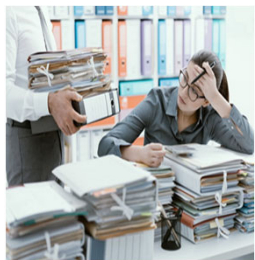


# The Status Quo

The current state of your business



The Status Quo



- Utilizing manual processes that are costly and time-consuming, thus preventing timely decision-making
- Limited number of finance/accounting staff, resulting in individuals performing duties that they are either over or under qualified for
- Individuals serve in multiple roles and are spread thin, thus limiting their ability to perform at a high level
- Current systems and processes are not effective at mitigating risk related to fraud, lack of effective internal controls and cyber-security
- Receiving inadequate strategic advice as the needs of the business become more complex

**YOUR  
GOAL**

# Your Needs & Desires

Optimal solution to drive business results



**Your Needs &  
Desires**



- Have enough of the right people in the right roles to better your organization
- Receive real-time financial reporting to enable better, faster decisions
- Access dashboards that allow you to keep your fingers on the pulse of your business
- Have processes in place to improve efficiency and reduce your organizational risk
- Receive proactive strategic guidance from your finance team that adds value to your business

# How do you get there?

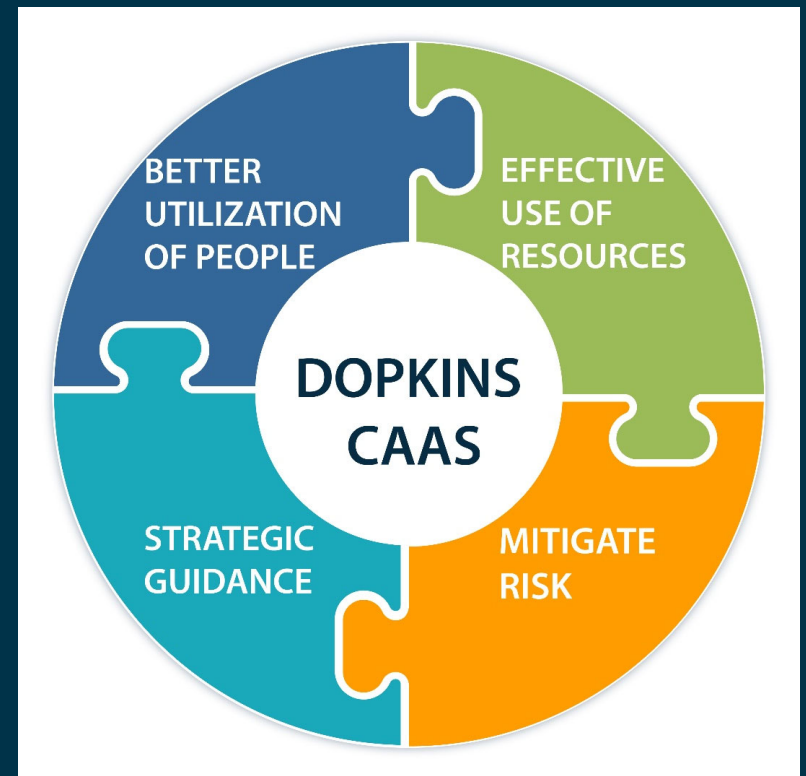
A road map to your competitive advantage

YOU ARE  
HERE

YOUR  
GOAL

With support from Dopkins Client Accounting & Advisory Solution (CAAS) Team, you can transform operational functions from cost centers to profit centers.

**Drive business results  
in four critical areas**







# Our Solution is scalable and tailor made for your business



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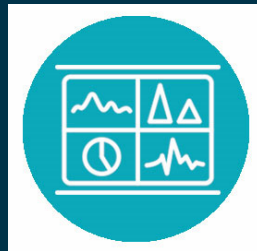
# The CAAS Advantage: Adding Value to Your Business

## The Right People



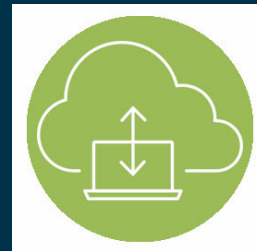
Serving you with a team that brings experience and expertise in all areas of the finance function focused on adding value to your business.

## Real-Time Visibility



Dynamic dashboards and reports give you a clear picture of how your business is performing.

## Connected Data



No more disparate data. We provide a best-in-class cloud platform that will be integrated with other platforms you utilize.

## Scalable Process and Controls



We utilize proven processes and controls that accommodate growth, improve efficiency and reduce risk.



*Our CAAS Team  
employs a strategic  
use of integrated  
cloud-based  
technologies  
customized to meet  
your needs*

## Enabling Technologies: Tools to help you achieve your goal

### CAAS “Technology Stack”

Sage Intacct for Accounting & Finance

Bill.com for Paperless Bill Pay

Expensify for Expense Management &  
Expense Reimbursements

Customized Integrations for Payroll &  
Other Platforms



## Your R.O.I.: CAAS by the numbers

- According to Indeed, as of August 4, 2020, the following are the average base salaries for the members of a typical finance department:

• Chief Financial Officer:	\$141,000
• Controller:	96,000
• Accounting Manager:	80,000
• Accounting Clerk:	<u>35,000</u>
• Total	<u>\$352,000</u>



- These amounts do not include additional costs related to:
  - Employee benefits (retirement benefits, payroll taxes, insurance, etc.).
  - Employee turnover
  - Technology and information security

# Your R.O.I.: **Solutions for complex business issues**

Businesses of all types and sizes are becoming increasingly complex from a financial management and accounting perspective. This is driven, in part, by:

- **Markets they serve:** Global economy, multi-state, international
- **Customers:** How customers want to transact business more diverse
- **Vendors:** Terms & conditions and other aspects of the vendor relationship create accounting complexities

As a result, the needs of a small or mid-size business are similar to a much larger enterprise, just on a lesser scale.

# Your R.O.I.: **CAAS team approach**

Our CAAS team includes professionals with combined experience of over 80 years in all areas of the finance function.

We will work collaboratively with you to develop a service framework that adds the most value to your business.

The businesses we work with are able to better deploy the key people they have in order to optimize the use of their skills, while at the same time saving as much as 25 – 30% of the cost of hiring enough of the right people.

## Meet the CAAS Team:



Joseph A. Heim,  
CFE, CPA



Nicholas Fiume,  
CPA



Matthew R.  
Huefner



Karen D. Costa,  
CPA



Albert A. Nigro,  
CPA, CVA



Kevin W. Stackman,  
CPA



Chad R. O'Connell,  
AIF\*

# Dopkins & Company at a Glance

Dopkins is a regional firm, located just outside the City of Buffalo. Begun by Leonard Dopkins as a sole practitioner in 1955, we have grown into one of the largest independent accounting firms in Western New York. With over 100 team members, our composition provides us with the necessary flexibility to meet our clients' staffing requirements of virtually any nature during the year.

Our client accounting & advisory solution helps business owners and organization leaders transform their accounting & finance function from a cost center to a profit center by helping to drive the performance of the business. We help owners confront challenges related to people, resources, organizational risk and the need for high-level strategic advice and counsel.

Our mission is to continually find ways to better serve our clients. We add value by helping our clients confront challenges and seize opportunities to maximize the performance of their businesses and maximize their individual wealth. Our client accounting & advisory solution better positions our firm to advise our clients in a more dynamic way.



## What's next?

**To learn more about how Dopkins CAAS team can help you confront challenges and seize opportunities to maximize the performance of your business, please contact:**

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