

# NEW CLIENT ROADMAP

## OUR SUCCESS STARTS WITH YOU!

At Wilson Toellner CPA, we seek to bring value to every client relationship, and we believe that the greatest source of our value lies in our ability to help our clients move closer to their goals.

Technology provides us with great tools for streamlining and automating business processes, and we are passionate about introducing clients to technology that saves time and boosts results.

Our use of technology results in less manual data entry, leaving more time for high-level interaction with our clients and more time building strategies that help you succeed.

Our value is the sum of the outcomes and experiences we deliver to our clients. It is most often measured in the time we help save them, the goals we help them reach, the money we help them keep, and the peace of mind we help them create.

## YOUR TEAM



### RELATIONSHIP TEAM

Solution experts striving to ease client pain points



### DESIGNATED ACCOUNT MANAGER

Trusted advocates looking out for the client's best interest



### ONBOARDING SPECIALIST

Individual devoted to setting you up for success



### TEAM OF CONSULTANTS

Dependable advisors dedicated to achieving your goals

SEDALIA  
2700 Matthew Drive

MARSHALL  
2751 S Odell Ave.

LAKE OZARK  
2729 Bagnell Dam Blvd.

CAMDENTON  
985 East US Hwy 54



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

# IMPLEMENTATION

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## 1. INITIAL CONTACT-

We will contact you to schedule a discovery meeting at a convenient time for you.

## 3. PRESENTATION-

We present to you our proposal for services which includes a monthly investment amount and any fees for startup services. Our value pricing broken into monthly payments eliminates surprise billing.

## 5. TRANSFORMATION PERIOD-

This stage is where the magic happens! We handle the transition, implementation, cleanup, training, and upgrades, transforming your accounting, payroll, and other services into our software applications for real-time results and instant success.

## WELCOME HOME-

Our team is here to help you focus on what you love - running your business - while we provide the support and expertise you need.

10 DAYS

15 DAYS

20 DAYS

30 DAYS

45 DAYS

ONGOING

## 2. DISCOVER & FACT FINDING PROCESS-

We meet with you to understand your needs, challenges, and goals, and to learn the details of your business. Afterward, we'll provide a meeting summary and a checklist of items needed to build a proposal for you.

## 4. YOUR COMMITMENT & ONBOARDING PLAN-

After reviewing our proposal contact us to accept it. Our onboarding team will then create a customized plan and reach out to begin the process.

## 6. MEETING YOUR TEAM-

Once your transition is complete, you'll meet your dedicated team. Our trusted advisors will build an ongoing, communicative and value-driven relationship, ensuring your goals are consistently met.