



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
660-827-4990

Marshall

2751 S Odell Ave.
660-886-6815

Lake Ozark

2729 Bagnell Dam Blvd.
573-964-5739

Camdenton

1185 N Hwy 5
573-346-6822

Implementation

1. Initial Contacts

We discuss with you how we work and how we like to work, along with our vision and value to determine if we are the right fit for you.

3. Presentation

We build a proposal and business strategy toolkit to present to you in a meeting. Your strategy toolkit is your initial investment and now you take time to review your proposal.

5. Meet Your Onboarding Specialist

Your onboarding specialist will reach out to discuss our plan to get you implemented as a new Wilson Toellner client.

7. Meeting Your Team

Once your onboarding specialist has completed your transition, you will meet your team. Our team of trusted advisors will provide an ongoing, communication and value driven relationship, where you know your goals are being achieved.

10 Days

15 Days

20 Days

30 Days

45 Days

60 Days

Ongoing

2. Discovery & Fact Finding Process

We have meetings with you to identify your needs, wants, challenges and goals and to learn the nuts and bolts of your business so we can provide solutions. We will provide a summary of our meetings, an introduction packet and checklist of items we need to continue.

4. Commitment & Onboarding Plan

Our onboarding and relationship teams will develop a customized onboarding plan that provides key dates and indicators for meeting your desired goals.

6. Transformation Period

This stage in the process encompasses transition, implementation, cleanup, training, upgrades, etc. Your accounting, payroll, and other services will be transformed into our softwares that provide real time results and access.

Welcome Home

Our team is here to help you do what you love, run your business, while we provide assistance and expertise.

