

# Orchestrate Every Step of Your Client Lifecycle with Karbon

From first contact to the first payment,  
one unified experience

November 12, 2025





# Hosts



**Justin Main**

**Karbon**  
General Manager,  
Engagements, Billing &  
Payments



**Rowan Van Tromp**

**Karbon**  
Principal Customer  
Success Manager



WE ARE KARBON

# The leading global, cloud-native practice management platform built for the accounting industry.

18.5

Average hours saved per week per employee using Karbon\*

#1

Highest rated accounting practice management software\*\*

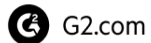
3K+

Accounting firms using Karbon on a daily basis

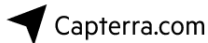
100+

Product Developers

★★★★★ 4.8



★★★★★ 4.7



★★★★★ 4.7



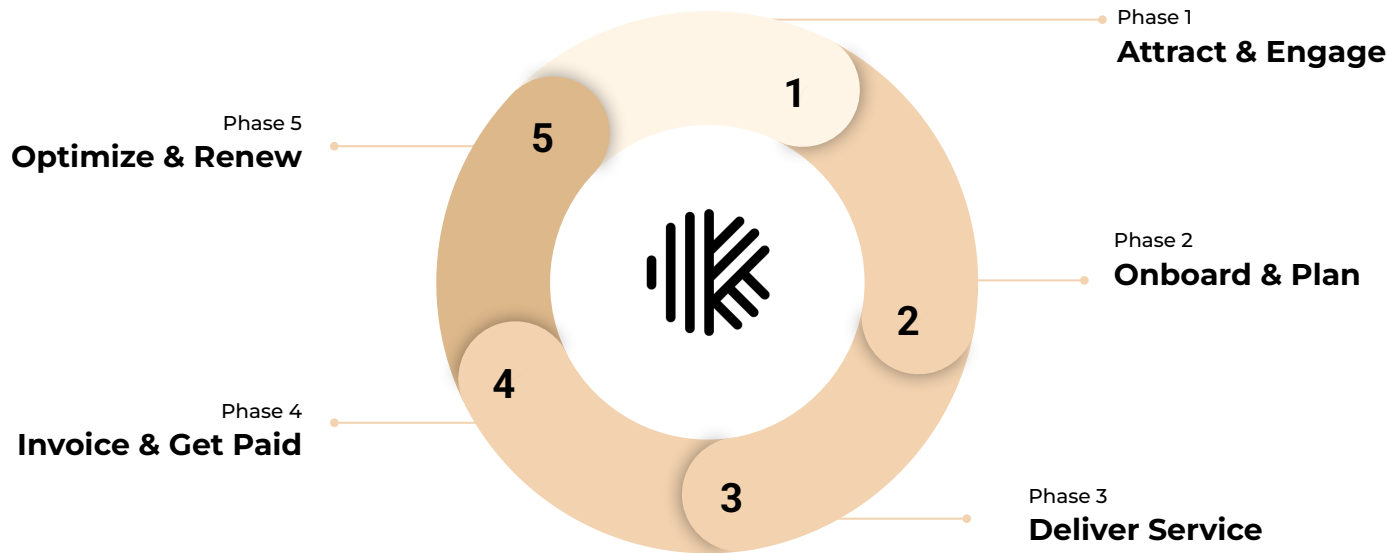
\*Obtained through Karbon's 2024 Firm Usage Survey.

\*\*G2 ranking



# Understanding the Full Client Lifecycle

# Every firm manages this lifecycle, Few manage it seamlessly.



Karbon helps you orchestrate each phase with connected tools,  
automated workflows, and actionable insights



POLL

**How many software tools  
does your firm use to  
manage the client lifecycle?**

# 2025 Accounting Tech Research

6

Client Service Tools

8

Practice Tools



14

Average number of unique  
software products in a firm.

# Disconnected client lifecycles create real costs



**Fragmented data  
slows actions and  
decisions**



**Admin overhead eats  
into profits**



**Clients feel  
the friction**



# **From Complexity to Clarity:** **The Smart Firm's Playbook**



# From complexity to clarity

By managing your firm's full client lifecycle in Karbon, you consolidate tools, streamline workflows, breakdown information silos, and gain unprecedented visibility.

**All of which empowers you to lead with unparalleled confidence and clarity.**

## Before Karbon

-  Proposals & ELs
-  Client Portal & DMS
-  CRM
-  Project Management
-  Billing & Payments
-  Reporting
-  Internal Communication
-  External Communication

## After Karbon

-  Proposals & ELs
-  Client Portal & DMS
-  CRM
-  Project Management
-  x  Time, Billing & Payments
-  x  Reporting
-  x  Internal Communication
-  x  External Communication



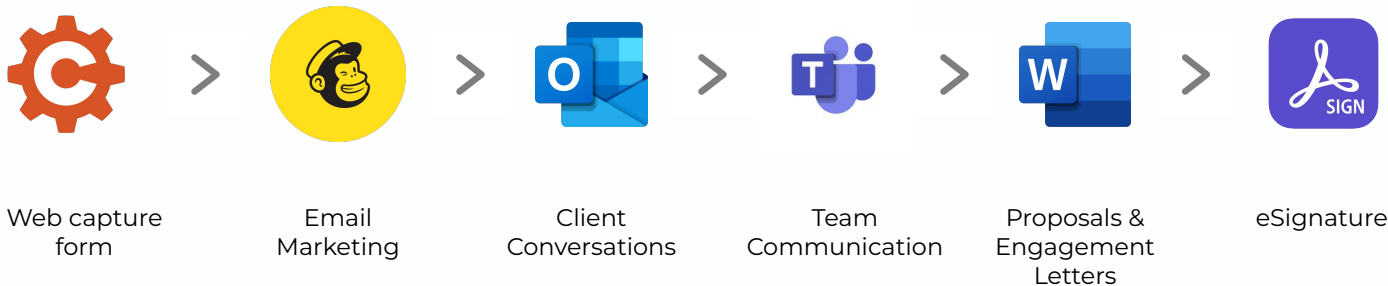
# **Phase 1**

## **Attract & Engage**



# Before Karbon: Great tools, disconnected experience

*Client data lives everywhere, slowing collaboration and responsiveness.*



- Client data is manually entered and maintained in every tool.
- Teams lose context and speed when updates happen in one system but not everywhere else.
- Clients struggle to collaborate efficiently with your team

# After Karbon: Streamlined prospect to client workflow



Web capture  
form

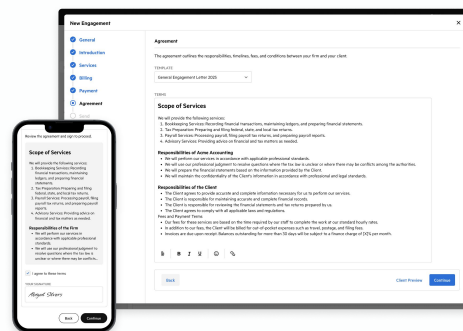
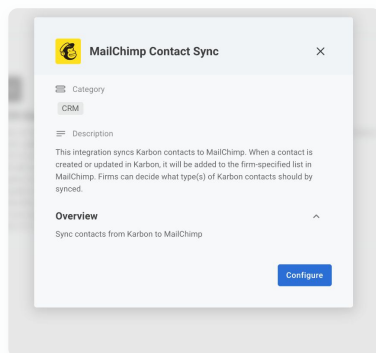
Email  
Marketing

Client  
Conversations

Team  
Communication

Proposals &  
Engagement  
Letters

eSignature



B Booker Financial &amp; Business Services ▾

📄 Triage 1,593

☰ My Week

➡ Assignments

📁 Work

👤 Contacts

🔗 Intelligence

📊 Insights

🕒 Time

👤 Engagements

Service Templates

🕒 Billing

## RECENTLY VIEWED

📁 2025 Business Tax Retu...  
Callahan Auto Parts

📄 Callahan Auto Parts

📁 Monthly Accounting: Ca...  
Callahan Auto PartsAdd Filter

New Engagement

All

Draft

Awaiting Client

Accepted

Active

Ended

CLIENT

C Callah

D Dick's S

M Marcus

M Marcus

M Marcus

M Marcus

## Karbon Engagements

Bring every step of your client engagement journey, from proposals and work, to invoicing and payment collections, all in one platform.

Begin Tour

Powered by Navattic

START DATE

RENEWAL DATE

Jan 1, 2026

Jan 1, 2027

Jan 1, 2024

Jan 1, 2025

Dec 1, 2025

Dec 1, 2026

Jan 1, 2025

Jan 1, 2026

Jan 1, 2024

Jan 1, 2025

Jan 1, 2023

Jan 1, 2024

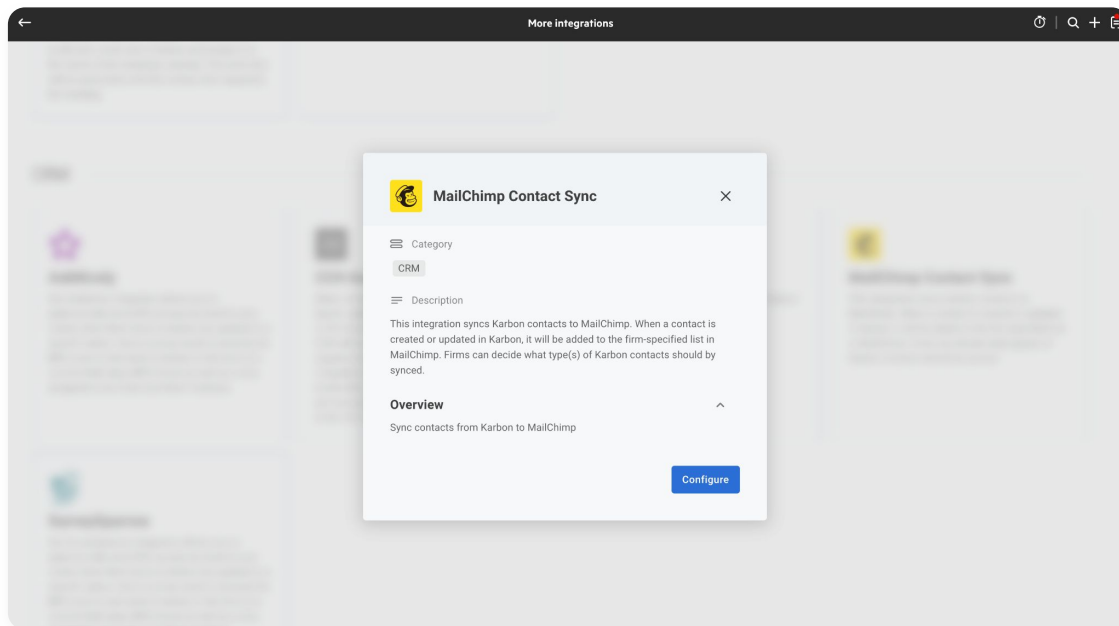
# Connect your marketing and client data with Karbon + MailChimp

Attract & Engage



Keep contacts in sync between your CRM and practice management platform

- Sync contacts from Karbon to Mailchimp
- Map Karbon contact types to MailChimp audience lists for targeted marketing campaigns (i.e. “Individual tax clients” in Karbon <=> “1040 Season” audience)
- Keep data clean & consistent between two systems of records



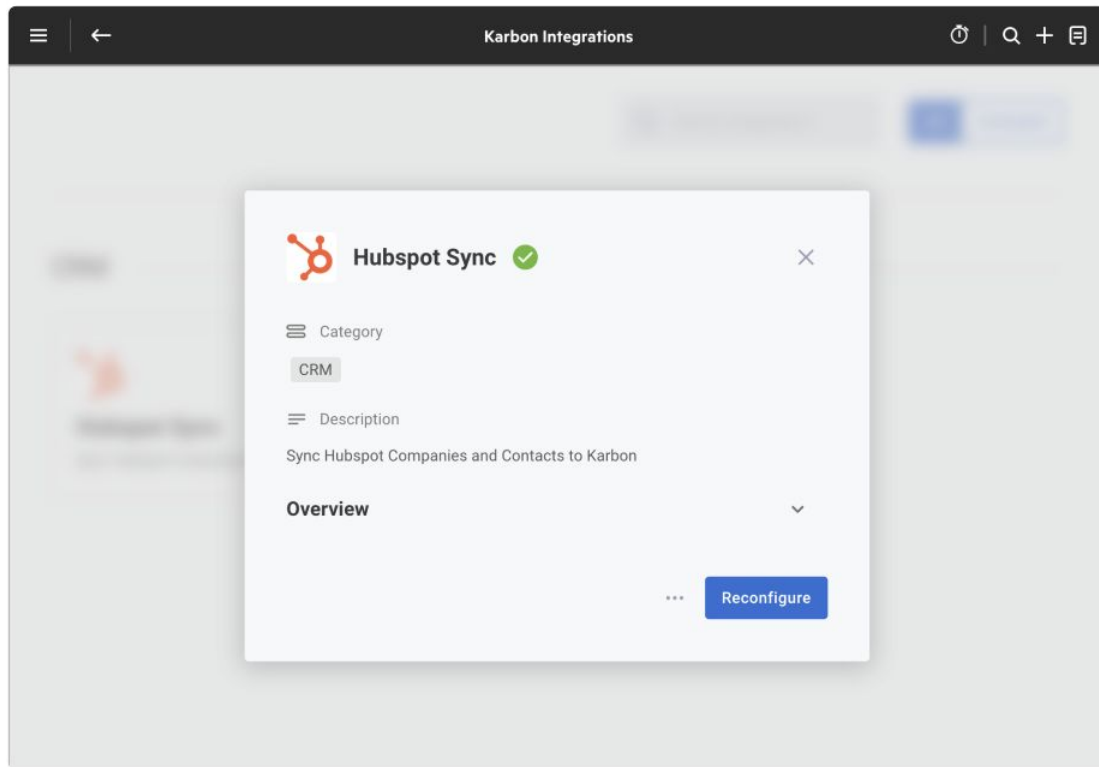
# Connect your CRM and client workflows with Karbon + HubSpot

Attract & Engage



## Sync HubSpot Companies and Contacts to Karbon

- Keep records up to date with real-time syncing
- Use the HubSpot client “Lifecycle Stage” to determine which records to sync
- Map your HubSpot Custom Fields to selected Karbon Accounting details



# Engagements

Early Access

Attract &amp; Engage



## Engage, bill, get paid, and renew—all in one platform

- Custom proposal & engagement letter builder
- Service templates, flexible billing terms, and collect payment details upfront
- Integrated digital signatures for rapid client approvals
- Connect work to signed agreements
- Automated billing and payment collection

## How does this help you?

- **Clients accept engagements faster** with digital proposals and signatures
- **Map work to service agreements** to ensure your team consistently delivers what was promised
- **Recurring billing and auto-payments** provides predictable cash flow and increases revenue

**New Engagement**

- General
- Introduction
- Services
- Billing
- Payment
- Agreement**
- Send

**Agreement**

The agreement outlines the responsibilities, timelines, fees, and conditions between your firm and your client.

TEMPLATE

General Engagement Letter 2025

TERMS

**Scope of Services**

We will provide the following services:

1. Bookkeeping Services: Recording financial transactions, maintaining ledgers, and preparing financial statements.
2. Tax Preparation: Preparing and filing federal, state, and local tax returns.
3. Payroll Services: Processing payroll, filing payroll tax returns, and preparing payroll reports.
4. Advisory Services: Providing advice on financial and tax matters as needed.

**Responsibilities of the Firm**

- We will perform our services in accordance with applicable professional standards.
- We will use our professional judgment to resolve questions where the tax law is unclear or where there may be conflicts...

☒ I agree to these terms

YOUR SIGNATURE

Arigal Silvers

Back Continue



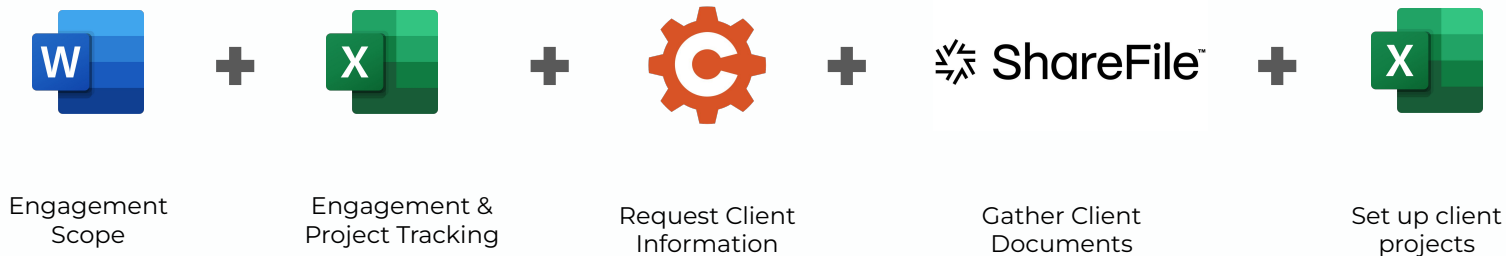
# **Phase 2**

## **Onboard & Plan**

# Before Karbon: Manual handoffs slow client onboarding



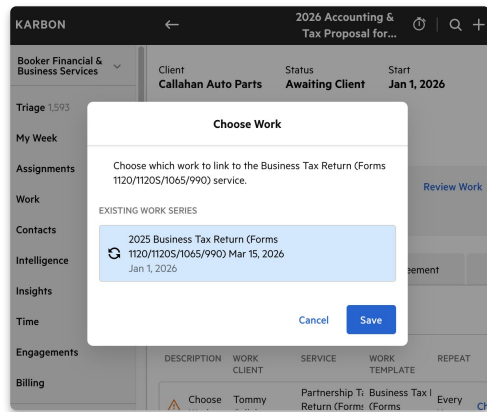
*Teams rely on scattered tools and constant double-checking to keep work moving.*



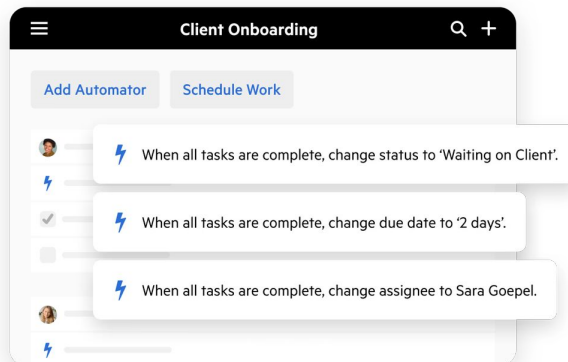
- Team members must manually hand off client information between tools.
- No single source of truth—details live in Word docs, spreadsheets, and shared drives.
- Partners and staff waste time chasing files, clarifying ownership, and double-checking onboarding statuses instead of serving clients.

# After Karbon: Automated client onboarding that runs itself

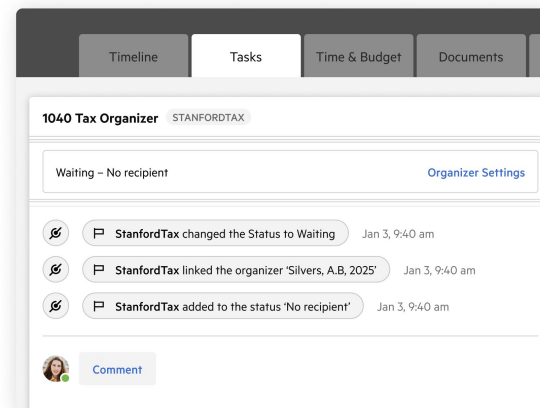
Onboard & Plan



Deliver what you promise with work mapped to engagements



Keep work flowing with task and staff assignment triggers



Expedite intake with built-in client tasks



# **Phase 3**

## **Deliver Services**



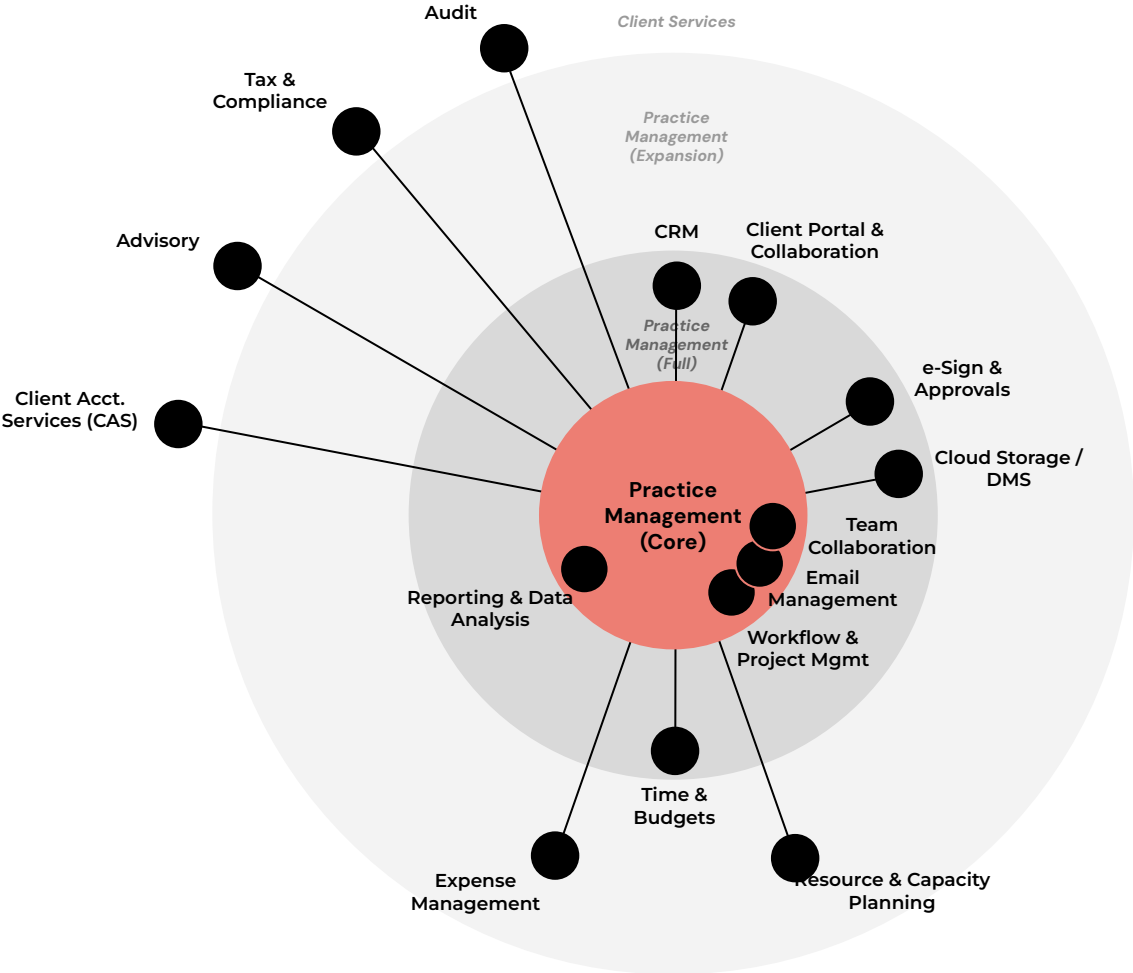
# Before Karbon: Essential tools — but fragmented workflows

*Your service delivery apps are powerful alone, but disconnected to your practice workflows*



- Each tool handles part of the service delivery, but no single view ties it all together.
- Updates and client data don't sync, no single source of truth.
- Teams waste time jumping between systems to confirm what's done and what's next.
- The client experience feels fragmented—slow responses, repeated requests, and missed context.

# After Karbon



# Automate advisory workflows with Karbon + Aider

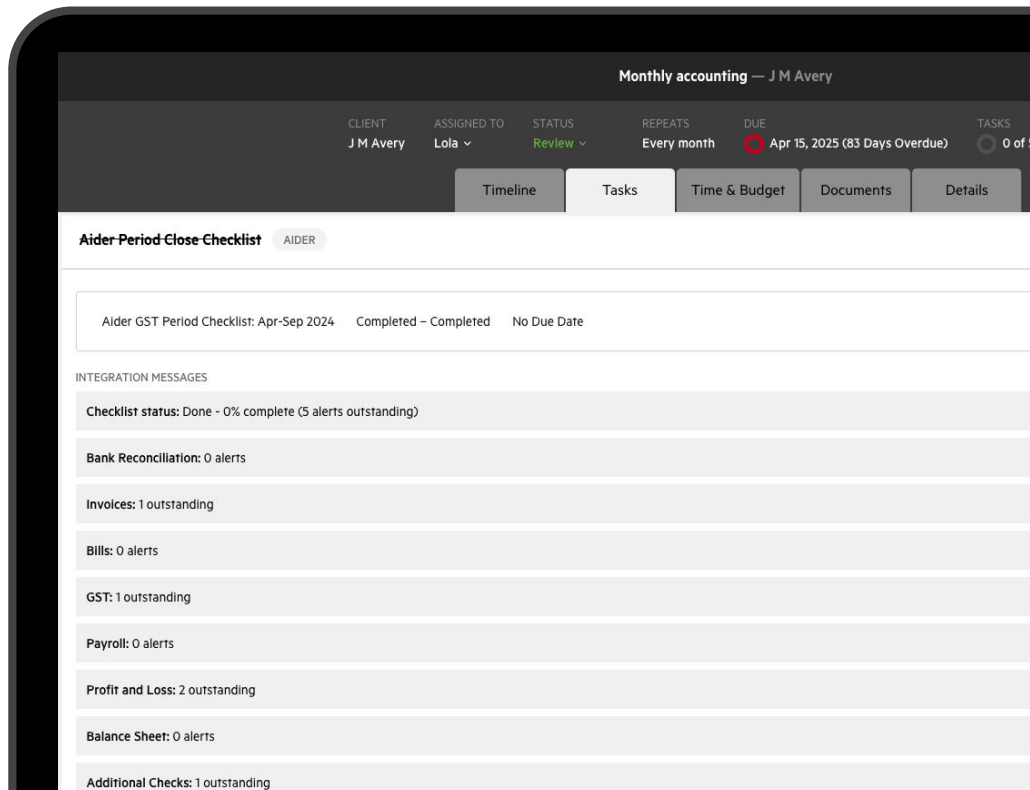
Deliver Services



## Automate period close & scale advisory:

- Real-time status updates from Aider to work items in Karbon
- AI-generated management reports with real-time KPIs and commentary
- An AI advisory assistant to ready your team for client reviews
- Client advisory reports that highlight opportunities for each client, positioning you as the proactive coach vs. the reactive firefighter

Learn more at: [karbonhq.com/integrations/aider/](https://karbonhq.com/integrations/aider/)



# Expedite client intake with Karbon + StanfordTax

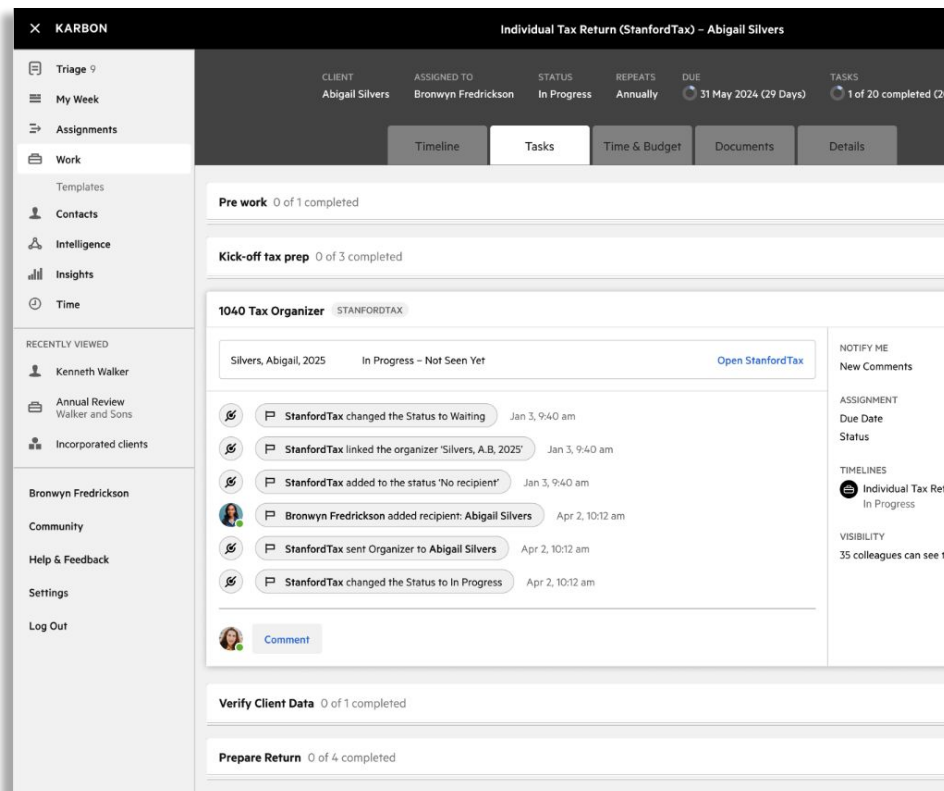
Deliver Services



Reduce data collection time and perfect your tax workflow from intake to delivery

- Centralized Workflow Efficiency. Reduce context switching for tax teams.
- Faster, More Accurate Preparation. Pre-sorted workpapers mean less chasing documents and more time for preparation.
- Better Client Experiences & Compliance. Personalized organizers help clients submit information faster and more accurately.

Learn more at: [karbonhq.com/integrations/stanford-tax/](https://karbonhq.com/integrations/stanford-tax/)



\*Exclusive discount available to Karbon customers

# Proactive tax advisory with Karbon + TaxNow

Actively monitor and get alerted for your clients' IRS transcripts and tax activities with the Karbon and TaxNow integration.

- Push IRS transcripts and tax account updates directly to the client record in Karbon
- Prioritized alerts delivered to your Karbon Triage with @mentions of client managers
- Download and open IRS transcripts right from Karbon
- Proactively monitor and prepare for issues before clients reach out.

\*Exclusive discount available to Karbon customers

Deliver Services



Learn more at: [taxnow.com/karbon-taxnow-integration](https://taxnow.com/karbon-taxnow-integration)

The screenshot displays the Karbon software interface for a client named Abigail Silvers. On the left is a navigation sidebar with categories like Triage, My Week, Assignments, Work, Contacts, Intelligence, Insights, Time, Engagements, and Billing. The main area shows a 'Tax Now Alert' for Code 806: W-2 or 1099 Withholding. The alert message states: 'The tax module has been credited for withheld taxes and excess FICA claimed on form 1040/1041'. Below this is a table with tax data.

| TAX PERIOD | FORM | ALERT DATE  | TRANSACTION DATE | AMOUNT     |
|------------|------|-------------|------------------|------------|
| 2024       | 1040 | Jun 2, 2025 | Apr 15, 2025     | -20,531.00 |

Below the table are links for 'Download Transcript' and '@Sara Goepel'. A timeline of activity follows, including a note from TaxNow and a comment from Simon Hilton. The timeline is currently set to May.

# Work smarter with AI-powered digital teammates

Deliver Services



## AI workflow agents that do the groundwork

- Task-based agents embedded in your workflows
- Connect to essential tools and perform activities outside of Karbon on your behalf
- Elevates your team to focus on high-value tasks

The screenshot displays the Karbon software interface, titled "Monthly Accounting & CFO Advisory - Reach Foundation". The interface is divided into a left sidebar and a main content area.

**Left Sidebar:**

- Navigation:** Triage, My Week, Assignments, Work, Templates, Progress Report, Contacts, Intelligence, Insights, Time, Engagements, Billing.
- RECENTLY VIEWED:** Kenneth Walker, Annual Review Walker and Sons, Incorporated clients.
- User/Team:** Sara Goepel, Academy, Community, Help & Feedback, Settings, Log Out.

**Main Content Area:**

- Header:** CLIENT: Reach Foundation, ASSIGNED TO: Bronwyn Fredrickson, STATUS: In Progress, REPEATS: Monthly, QUEUE: None, DUE: April 1, TASKS: 4 of 19 completed (20%).
- Tabs:** Timeline, Tasks, Documents, Budget, Details.
- Task List:**
  - ☒ Make adjusting entries and complete necessary reconciliations (Completed)
  - Create Financial Statement Workpapers (ADVICE AGENT, Complete)
  - Month End Virtual-CFO Advice (ADVICE AGENT)
- Task Details (Month End Virtual-CFO Advice):**
  - Review accounts, identify points of interest and draft a document of advice (Completed, View Draft Advice)
  - Activity Log:
    - Automator changed the agent status to Processing (1m ago)
    - Advice Agent connected to Xero (1m ago)
    - Advice Agent analyzed data and identified points of interest (Just now)
    - Advice Agent saved draft document of advice to this work item (Just now)
  - Advice Agent @sara:** I compared reports from the current period against the last 3 periods, including Balance Sheet, Profit and Loss and Cashflow Statement.  
Top points of interest I found were:
    - Operational Expenses: 12% increase, mainly from software subscriptions and travel.
    - Accounts Receivable: Increased by 20% compared to last month. Suggest reviewing aging report.
    - Marketing expenses were 17% over budget. Recommend variance tracking to keep aligned with goals.I have created a draft document of advice and saved it to this work item ready for your review. (Just now)
  - Comment:** [User Avatar] Comment
- Right Sidebar:**
  - NOTIFY ME: New Comments
  - ASSIGNMENT: Due Date, Status
  - TIMELINES: Month End Close (In Progress)
  - VISIBILITY: 35 colleagues can see this task

# Expedite client intake with Karbon + StanfordTax



Reduce data collection time and perfect your tax workflow from intake to delivery

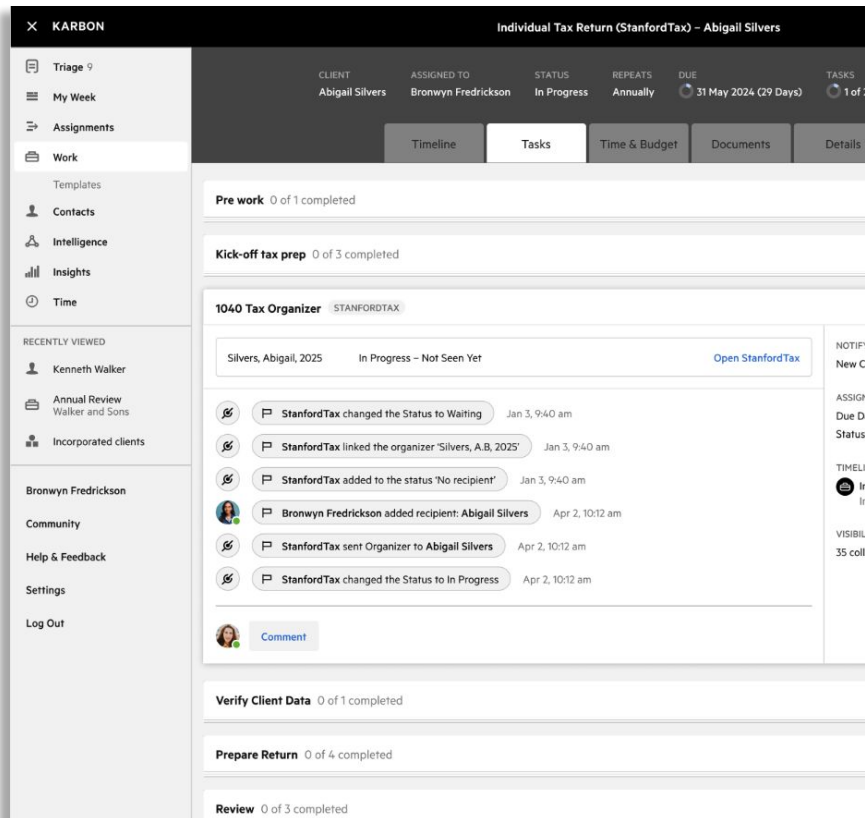
- Build personalized tax organizers in seconds with AI
- Access organizers, client docs, and workpapers directly in Karbon
- Automate document renaming & sorting with files organized and bookmarked for easy review
- Give clients one place to login with direct Karbon for Clients portal integration
- Track intake progress across all clients with Progress Reports

## How does this help you?

- **Centralized Workflow Efficiency.** Reduce context switching for tax teams.
- **Faster, More Accurate Preparation.** Pre-sorted workpapers mean less chasing documents and more time for preparation.
- **Better Client Experiences & Compliance.** Personalized organizers help clients submit information faster and more accurately.

**\*Exclusive discount available to Karbon customers**

Learn more at: [karbonhq.com/integrations/stanford-tax/](https://karbonhq.com/integrations/stanford-tax/)



# Intuit ProConnect Integration



**Accelerate tax work delivery with ProConnect embedded into your practice management workflow.**

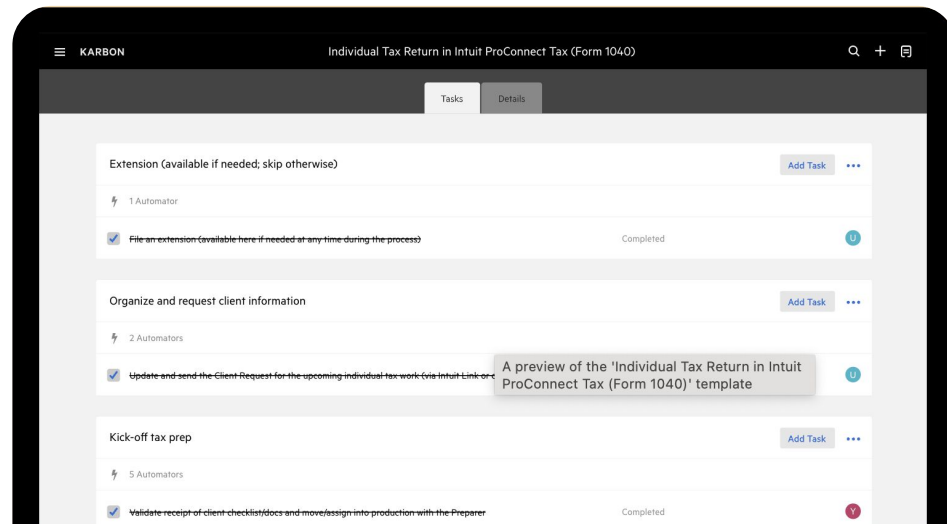
- **Automated tax work creation** from ProConnect returns
- **Real-time e-file status tracking** within Karbon
- **Two-way contact synchronization** for data consistency
- **Tax-specific work templates** for standardized processes

## How does this help you?

- **Reduce admin burden** with automated work creation
- **Prevent missed deadlines** with integrated status tracking
- **Enhance accuracy** by eliminating duplicate data entry
- **Improve client experience** with prompt delivery
- **Increase efficiency** with less app-hopping
- **Scale your tax practice** without scaling your headaches

A screenshot of a web interface showing a 'Create Tax Return in ProConnect' dialog box. The dialog has a title bar and a main content area. On the left, there's a sidebar with a 'Create Tax Return' checkbox and a 'PROCONNECT' section containing 'Create Return' and 'Link to Existing' buttons. The main area shows 'CLIENT: Abigail Silvers', 'CHOOSE TAX YEAR: 2024' (with a dropdown arrow), and 'Cancel' and 'Create' buttons. A mouse cursor is hovering over the 'Create' button.

Learn more at: [karbonhq.com/integrations/proconnect/](https://karbonhq.com/integrations/proconnect/)





# **Phase 4**

## **Invoice & Get Paid**

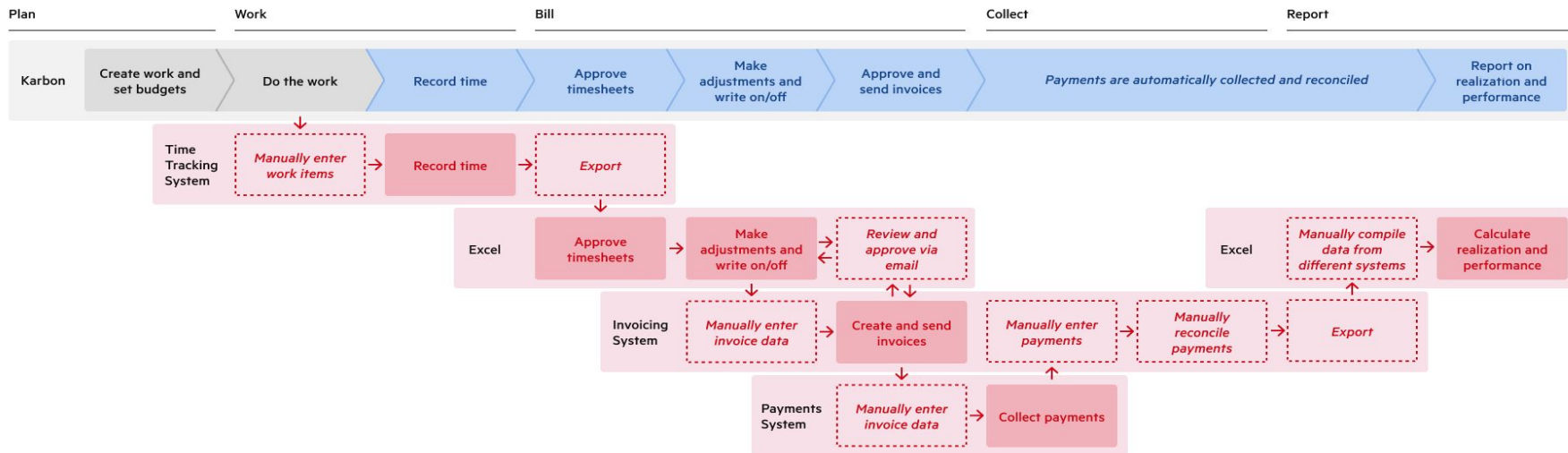
# Bill and get paid—all in one flow

Invoice & Get Paid



*Do the work, track time, create invoices, and collect payments without switching systems.*

## Billing Workflow



# Bill as you go and get paid faster

Invoice & Get Paid



←

Tim < Oct 6 - Oct 12, 2025 > Draft Status

Mon, Oct 6 - Tue, Oct 7 - Wed, Oct 8 - Thu, Oct 9 -

Add Time Entry

SUGGESTED TIME ENTRIES CLIENT

Business Tax Return (Forms 1120/1120S/1065/990) Reach Foundation

▼ Timesheet Activity

Tim @robin this was good work! Oct 3, 10:53 AM

Robin @tim You have a few suggested time entries on billable work c

AI suggested time entries that recover 2+ hours of billable time per employee, per week

Work

Ready to Bill Status: Ready to Bill Add Filter

Add Work 435 Work Items 348,638.75 USD Budget 2,560h 30m 138,403.58 USD Actual 874h 50m

Due In October 14 Billed 421

\*1065 Tax Return (simple) Knowles Engineering

Ready to Bill Oct 30

No Queue

Type: 1065

Fees: 1,805.00

Fee Type: Time & Materials

| Budget | Actual   | Remaining |
|--------|----------|-----------|
| 8h     | 6h 1m    | 1h 59m    |
| 500.00 | 1,805.00 | -1,305.00 |

William Monthly Accounting - Gold Package Paolo BarHart Business

Ready to Bill Oct 28

No Queue

Type: Accounting

Fees: 2,000.00

Fee Type: Fixed Fee

| Budget   | Actual | Remaining |
|----------|--------|-----------|
| 7h       | 2h 30m | 4h 30m    |
| 1,950.00 | 650.00 | 1,300.00  |

\*Monthly Accounting - Gold Package ABCD Wilson Reed

Ready to Bill Sep 25

No Queue

Type: Accounting

Fees: 1,600.00

Fee Type: Fixed Fee

| Budget   | Actual   | Remaining |
|----------|----------|-----------|
| 7h       | 4h       | 3h        |
| 2,400.00 | 1,200.00 | 1,200.00  |

\*Monthly Accounting New Dunder Mifflin, Inc.

Ready to Bill Sep 25

No Queue

Type: Accounting

Fees: 2,000.00

Fee Type: Fixed Fee

| Budget   | Actual | Remaining |
|----------|--------|-----------|
| 7h       | 2h 30m | 4h 30m    |
| 1,950.00 | 650.00 | 1,300.00  |

Trigger billing readiness the moment work gets done—no arbitrary delays

Billing

Billed Every Month 3,000.00

First Invoice Oct 24, 2025, Auto Approve 12 Invoices total

| SERVICE                    | WORK CLIENT      | BILLING SCHEDULE | FEE TYPE  | TAX        | FEE      |
|----------------------------|------------------|------------------|-----------|------------|----------|
| Monthly Accounting Service | Reach Foundation | Monthly          | Fixed Fee | No Tax Set | 1,500.00 |
| Payroll Service            | Reach Foundation | Monthly          | Fixed Fee | No Tax Set | 1,500.00 |

Billed on Completion 800.00

Bill Manually

| SERVICE            | WORK CLIENT      | BILLING SCHEDULE | FEE TYPE  | TAX | FEE    |
|--------------------|------------------|------------------|-----------|-----|--------|
| Onboarding & Setup | Reach Foundation | On Completion    | Fixed Fee | -   | 800.00 |

Billed on Completion TBD

Bill Manually

| SERVICE                 | WORK CLIENT      | BILLING SCHEDULE | FEE TYPE         | TAX | FEE |
|-------------------------|------------------|------------------|------------------|-----|-----|
| Ad Hoc Advisory Service | Reach Foundation | On Completion    | Time & Materials | -   | TBD |

Bill your way, and evolve your pricing easily when you're ready.

# Karbon + QBOA/Xero

Invoice & Get Paid



## Keep your AR and GL in sync, automatically

- **Two-way contact sync** that keeps your client details in sync between your GL and Karbon
- **One-way invoice sync** that updates Karbon invoices in your ledgers instantly
- **Two-way payment sync** that reflects payments made on invoices from either system

## How does this help you?

- **Eliminate manual reconciliations**, invoices and payments stay accurate across Karbon and your GL in real time.
- **Save time and reduce errors** with less manual data entry and transfers
- **Unlock full visibility into work-to-cash flow**, so your team never gives away work for free
- **Maximize the power of your tools**—Karbon for work, clients, and invoicing, and GL for financial accuracy

The image displays four screenshots arranged in a 2x2 grid, comparing the Karbon interface (left column) with the QuickBooks Online (QBOA) and Xero interfaces (right column). Each screenshot shows a 'General Ledger' or 'Tax Return' view for 'ACME ACCOUNTANTS' and 'Anapurna Inc.' with a 'Due 2499.00' status. The Karbon interface includes a 'Progress Bill 238.00' section and a 'Tax Return' table. The QBOA and Xero interfaces show a 'General Ledger' table. A 'Tax Return' pop-up window is overlaid on the Karbon and QBOA screenshots, showing a progress bar and a 'Completed' status.

| DESCRIPTION            | ACCOUNT             | AMOUNT         |
|------------------------|---------------------|----------------|
| Partner Review         | 200 - Sales         | 134.00         |
| Extension              | 260 - Other Revenue | 42.00          |
| Tax Return Preparation | 200 - Sales         | 62.00          |
| Subtotal               |                     | 238.00         |
| Tax                    |                     | 119.00         |
| <b>Total</b>           |                     | <b>2499.00</b> |

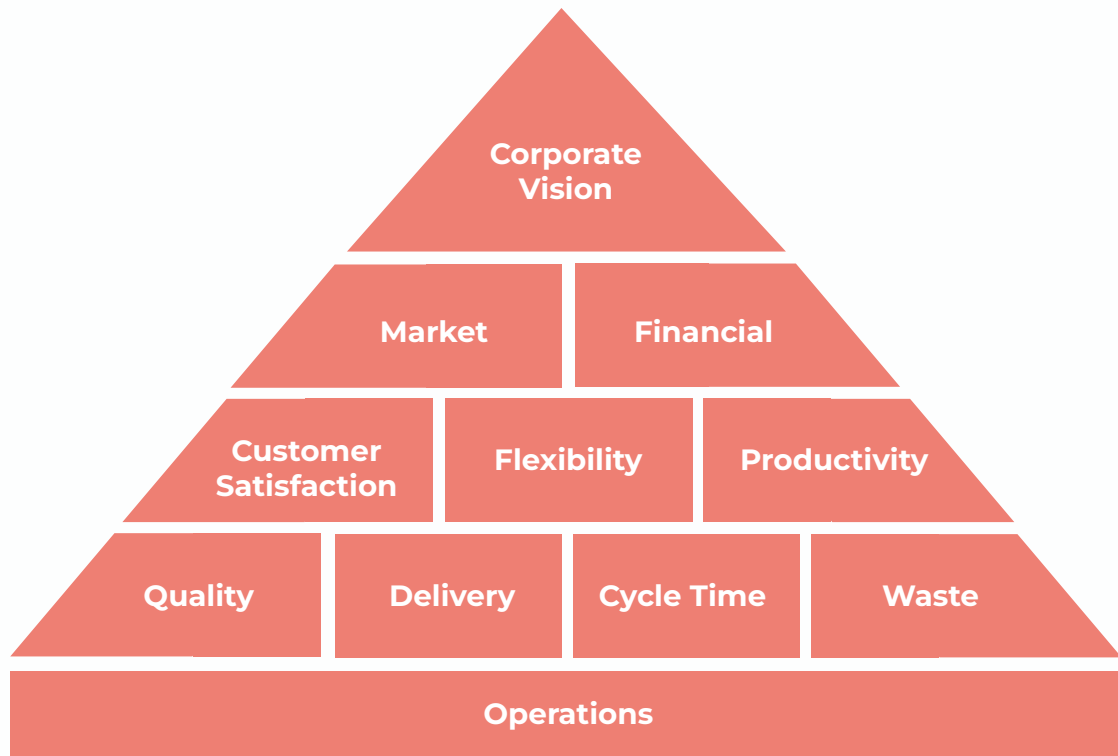


# **Phase 5**

## **Optimize & Renew**

# Performance Pyramid

Optimize & Renew



## Financial Measures

Internal-driven business metrics that measure operational and financial efficiency.

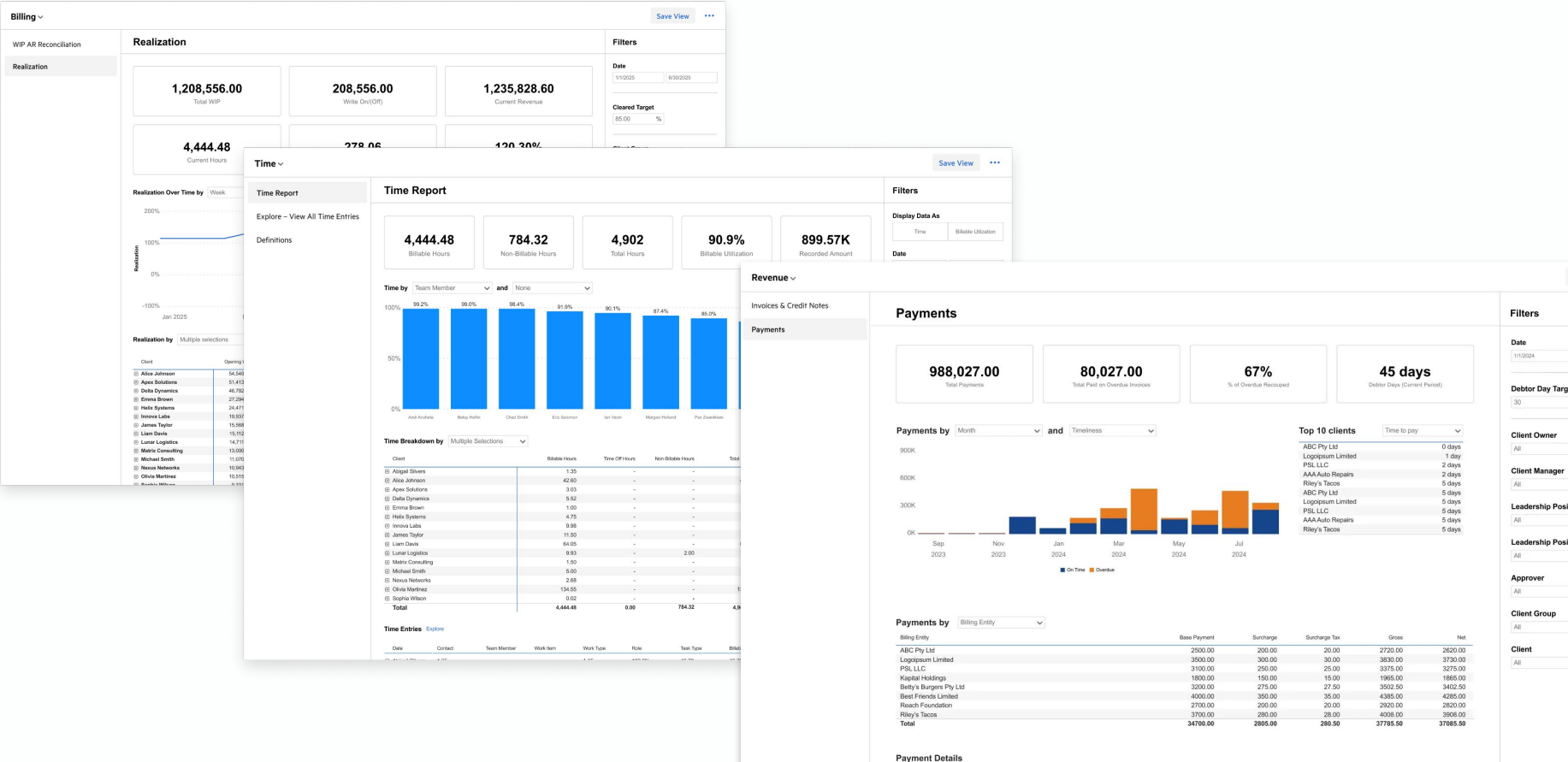
## Market Measures

External-driven metrics that measure how you're performing in the eyes of your clients and competitions.

Lynch and Cross, 1991

# Financial & Productivity Metrics

Optimize & Renew



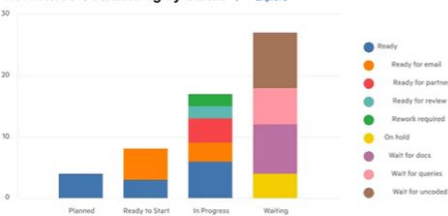
# Client Delivery

Optimize & Renew

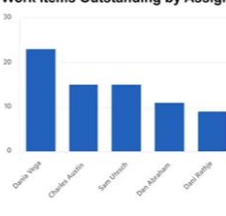


## Work Outstanding

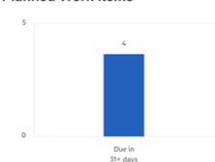
### Work Items Outstanding by Status



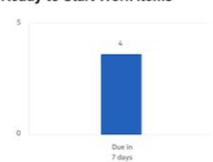
### Work Items Outstanding by Assigned Team Member



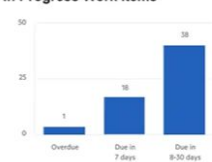
### Planned Work Items



### Ready to Start Work Items



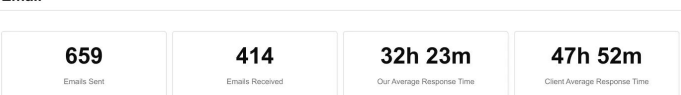
### In Progress Work Items



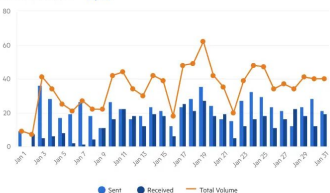
### Work Items Outstanding

| WORK ITEM TITLE     | ASSIGNED TO   | CONTACT         | PRIMARY STATUS | SECONDARY STATUS | WORK ITEM DUE DATE | WORKDAYS UNTIL DUE DATE |
|---------------------|---------------|-----------------|----------------|------------------|--------------------|-------------------------|
| *Monthly Accounting | Sam Utesch    | Abigail Silvers | Planned        | Prep             | Mar 30, 2023       | 70                      |
| *Monthly Accounting | Dan Abraham   | Friends Inc     | Planned        | Ready for        | Mar 18, 2023       | 58                      |
| *Monthly Accounting | Dan Abraham   | Abigail Silvers | Ready To       | Email            | Mar 2, 2023        | 42                      |
| *Monthly Accounting | Dania Vega    | George          | Start          | Prep             | Feb 23, 2023       | 35                      |
| *Monthly Accounting | Dania Vega    | Constanza       | In Progress    | Prep             | Feb 15, 2023       | 27                      |
| *Monthly Accounting | Jon Standford | Cruze Farm      | In Progress    | -                | Jan 11, 2023       | -8                      |
| *Monthly Accounting | Dan Abraham   | Abigail Silvers | Waiting        | On Hold          | Jan 15, 2023       | -4                      |

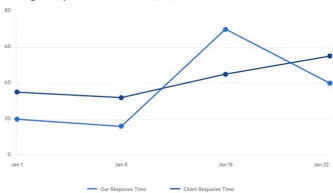
## Email



### Email Volume



### Average Response Times



### Email Volume - Top 5 Sent

| CONTACT           | CLIENT MANAGER  | SENT | RECEIVED | EMAIL RATIO |
|-------------------|-----------------|------|----------|-------------|
| Abigail Silvers   | Jake Lyman      | 90   | 150      | 1.7         |
| Frederick Wallace | Pax Zwannikken  | 86   | 92       | 1.1         |
| Nick Adams        | Frank Abernathy | 43   | 43       | 1.0         |
| Amy Adams         | -               | 41   | 25       | 0.6         |
| XYZ Inc           | Pax Zwannikken  | 26   | 15       | 0.6         |

### Average Response Times - Top 5

| CONTACT           | CLIENT MANAGER  | RESPONSE TIME (HOURS) |
|-------------------|-----------------|-----------------------|
| Frederick Wallace | Pax Zwannikken  | 72                    |
| Nick Adams        | Frank Abernathy | 50                    |
| Abigail Silvers   | Frank Abernathy | 45                    |
| XYZ Inc           | Pax Zwannikken  | 39                    |
| ABC Corp          | Pax Zwannikken  | 39                    |

## Filters

DATE: Last 1 Month

1/10/2023 - 1/10/2023

CLIENT GROUP: All

ORGANIZATION: All

PERSON: All

SENT BY: All

CLIENT MANAGER: All

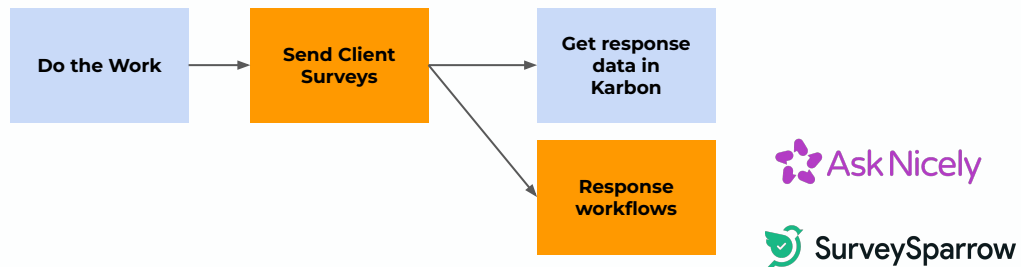
Powered by Karbon

# Delivery > Attract Feedback Loop

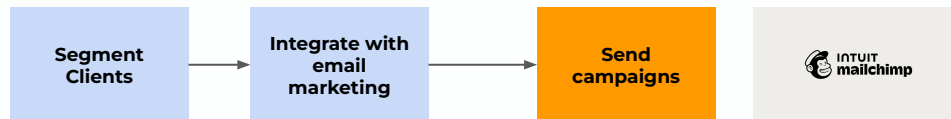
Optimize & Renew



## Client feedback



## Client service expansion



# Price confidently with AI

Optimize & Renew



## Crumble 2025 - Renewal | Billing

### ☆ Previous Engagement Summary

Crumble Bakery has a realization rate of 76%. compared to 81% firm-wide since June 30, 2024.

To enhance profitability and align with your top-performing client for the services below. This adjustment can help close the perform firm's overall realization.

### Billed Every Week

First Invoice June 30, 2025, Auto Approve ▾

| SERVICE            | WORK CLIENT    | BILLING | FEE TYPE  |          |          |
|--------------------|----------------|---------|-----------|----------|----------|
| Payroll Processing | Crumble Bakery | Weekly  | Fixed Fee | ☆ Review | 1,000.00 |

Payroll Processing is currently realized at 67.00%, compared to 74.00% firm-wide. Adjusting the fee can help close this gap and enhance profitability.

Would you like to increase this fee by 7.00%, bringing it to 1,070.00

Yes, increase fee No change

# Red Flags: What Your Team Is Really Telling You



## **Sometimes it's what your colleagues say:**

"I spent all morning pulling together the realization report."

"It takes me a full day to turn our time sheets into invoices."

"I can't find the latest client document."

"I'm the only one who knows how to run month-end close."

"It's too late to bill the client for that."

"I know we have that somewhere."

"I'm not sure if that's been done."

## **Sometimes it's what they don't say:**

Are they making lots of mistakes?

Are they skipping steps in a workflow?

Are they avoiding or missing tasks entirely?

# Key Takeaways & Next Steps



- Understand your own client lifecycle, where can you enhance?
- Be clear on what you want to measure and use tools that facilitate it
- Look for opportunities to automate as much as possible
- Focus on client experience at all points in the lifecycle
- Supercharge your client lifecycle with AI



POLL

**Would you like to learn more  
about Karbon?**

# Q&A



# Thank You

Learn more at

**[karbonhq.com](https://karbonhq.com)**

