



# How to manage scope creep in Karbon

karbonhq.com

KARBON

Triage

To-Do

Work

Contacts

Insights

Time

RECENTLY VIEWED

Individual Tax 1040

Tanya Franks

Internal Process Review

Management Team

Monthly Accounts

Xi Health Industries

Bronwyn Fredrickson

Help & Feedback

Settings

Logout

Work

Capacity Dashboard

Team: Accounting Team

Due: This Week

Add Filters

Add Work

26 Work Items

13,940.00 USD Budget82h 15m

6,460.00 USD Actual38h

7,480.00 USD Budget77h 30m

Andi Ancheta 5

Monthly Accounts Pacific Coast Logistics

In Progress

Due: Today

Budget 3h 30mActual 1h 15mRemaining 2h 15m

Danielle Ratje 2

Service Proposal Farmer Fresh Markets

In Progress

Due: Tomorrow

Budget 2hActual 30mRemaining 1h 30m

Lachlan Macindoe 4

Financial Statements Roger Horder

In Progress

Due: Wednesday

Budget 6h 30mActual 45mRemaining 5h 45m

Paige Macindoe 3

Internal Process Review Management Team

Ready for Review

Due: Wednesday

Budget 2hActual 3h 15mRemaining 45m

Individual Tax 1040 Harriet London

Waiting on Client

Due: Tomorrow

Budget 3h 30mActual 1hRemaining 2h 30m

Monthly Accounts Richard Short Co

Approved

Due: Wednesday

Budget 2h 30mActual 3h 15mRemaining -45m

Monthly Accounts Moana Taranaki

Ready for Review

Due: Thursday

Budget 2h 30mActual 1h 40mRemaining 50m

Individual Tax 1040 Andy Biggs

On Hold

Due: Friday

Budget 3h 30mActual -Remaining 3h 30m

Discovery Meeting Lola Goepel

Planned

Due: Friday

Budget 2hActual -Remaining 2h

OKRs Q3 Management Team

Planned

Due: Friday

Budget 2hActual -Remaining 2h

# Meet your host



**Tim Donohoue**

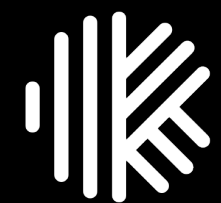
Karbon

Head of Sales



- 1. Close any open apps**
- 2. Ask and we'll answer**

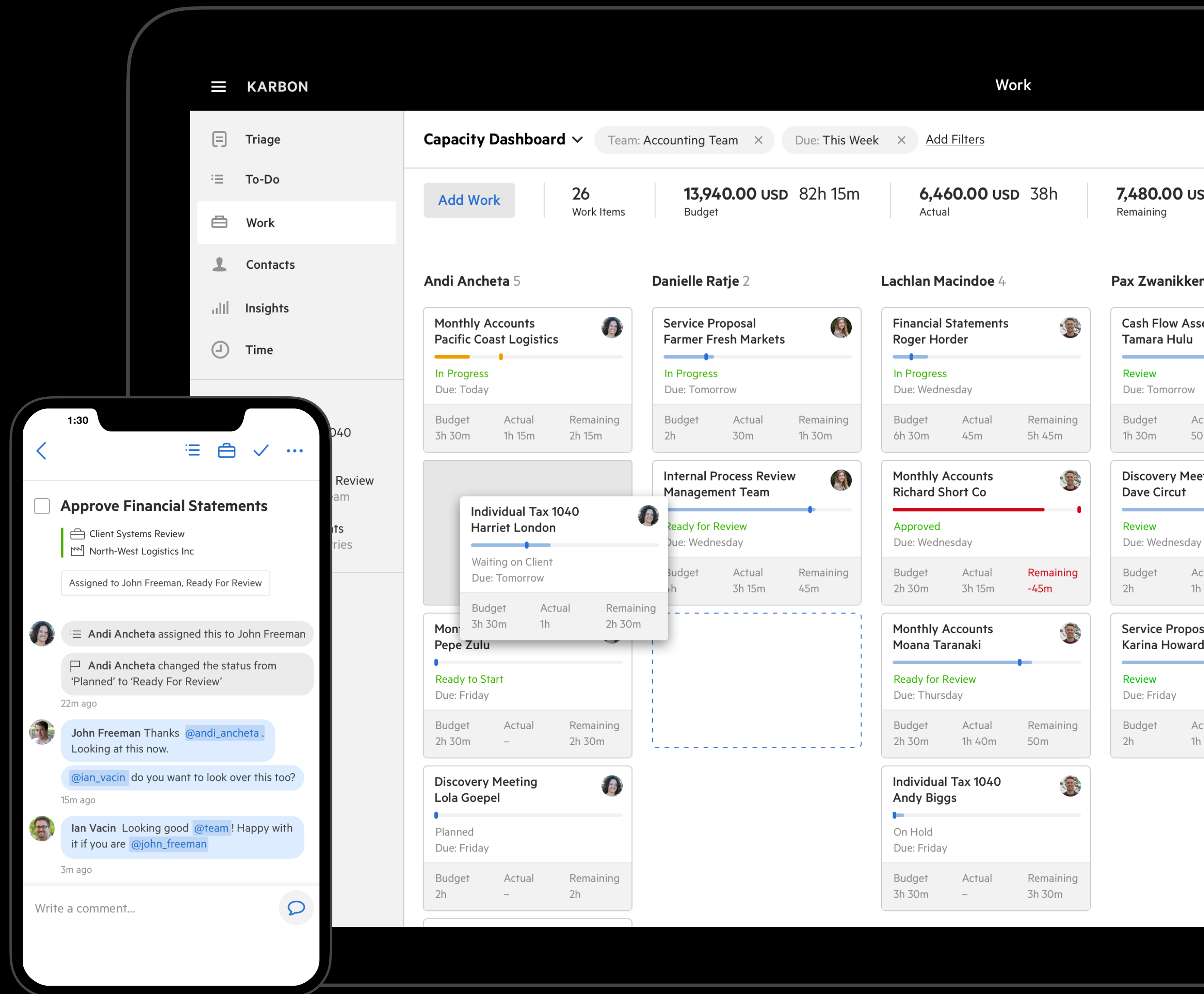




# Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED



# Quick Poll



# Scope creep is one of your firm's biggest costs

- Time and effort you didn't budget for
- Different client expectations
- Inefficient processes
- Poor internal collaboration
- Client's needs changing and evolving
- **Write-offs and completing work for free**



# How you can avoid scope creep with Karbon

- Integrate your proposal process with your project management tool
- Standardize processes and budgets
- Entering time versus budget for profitability reporting
- Proactively managing ad hoc requests
- Automate basic process for chasing clients
- Documentation of per client processes as they evolve



# Demo





# Questions



# Thank you

Get started at [karbonhq.com](https://karbonhq.com)

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