

Customer Segments	Value Proposition	Customer Relationships	Sales Channels
<p>S1: &lt; \$2M in Revenue</p> <ul style="list-style-type: none"> <li>Industry Agnostic - w/o significant inventory</li> <li>Competitors:</li> <li>Target area:</li> </ul>	<ul style="list-style-type: none"> <li>Spend more time on their business</li> <li>Making it easy for the client</li> <li>Save money on cost of employee and benefits</li> <li>Speed of information and timely reporting</li> <li>Information visibility (dashboard)</li> <li>Outsourcing access 40 hours/week x 52 weeks</li> <li>Access to expertise/experience/multiple people</li> <li>KPI's</li> </ul>	<p>Roles:</p> <ul style="list-style-type: none"> <li>Bookkeeper</li> <li>Account Manager</li> </ul> <p>Common Touch Points:</p> <ul style="list-style-type: none"> <li>Onboarding the client</li> <li>Questions or need from the client</li> <li>Dashboard and KPI's</li> <li>Monthly financial summary sent to the client</li> </ul>	<p>Internal channels:</p> <ul style="list-style-type: none"> <li>Shareholders</li> <li>Staff</li> <li>Firm awareness</li> <li>One on one internal sales meetings</li> </ul> <p>External channels:</p> <ul style="list-style-type: none"> <li>Online information</li> <li>Search engine optimization</li> <li>Trade associations</li> </ul>
<p>S2: \$2M - \$10M in Revenue</p> <ul style="list-style-type: none"> <li>Industries: Professional Services, Healthcare Providers, Contractors, Non Profits, Restaurants</li> <li>Competitors:</li> <li>Target area:</li> </ul>	<ul style="list-style-type: none"> <li>Spend more time on their business</li> <li>Don't need full-time controller</li> <li>Information visibility (dashboard)</li> <li>Timely reporting</li> <li>Lower risk of knowledge "walking out the door"</li> <li>Outsourcing access 40 hours/week x 52 weeks/year</li> <li>KPI's</li> </ul>	<p>Roles:</p> <ul style="list-style-type: none"> <li>Bookkeeper</li> <li>Account Manager</li> <li>Controller/Strategic Advisor</li> <li>CFO - SDK would outsource</li> </ul> <p>Common Touch Points:</p> <ul style="list-style-type: none"> <li>Onboarding the client</li> <li>Questions or need from the client</li> <li>Dashboard and KPI's</li> <li>Formal communication or scheduled call to go over monthly agenda</li> </ul>	<p>Key Partnerships</p> <ul style="list-style-type: none"> <li>Referrals: payroll companies, HR consultants, bankers</li> <li>Current Clients</li> <li>QBO – Diamond Level</li> </ul>
Revenue	Resources	Cost	
<ul style="list-style-type: none"> <li>Needs assessment – wedge offering idea</li> <li>Set-up fee</li> <li>Accounting clean-up</li> <li>Monthly ongoing services</li> <li>Controllershship/consulting services</li> <li>CFO services</li> <li>Service Bundling (Good, better, best) - Possible add-on features as well.</li> </ul>	<ul style="list-style-type: none"> <li>Human – bookkeepers, experienced accounting professionals with experience working with small businesses or a particular niche, QB Certification</li> <li>Technology stack – QBO, Bill.com, Expensify, Paychex, Dashboard, website (client login)</li> <li>Service sheet</li> </ul>	<ul style="list-style-type: none"> <li>Software to automate (cost driven)</li> <li>Marketing/Advertising</li> <li>Staff – how many clients can we add on before we need to add more staff?</li> </ul>	