



Usage benchmarks: How does your firm compare?

karbonhq.com



Meet your hosts



Andi Ancheta

Karbon
VP of Customer Success



Ian Vacin

Karbon
Chief Customer Officer



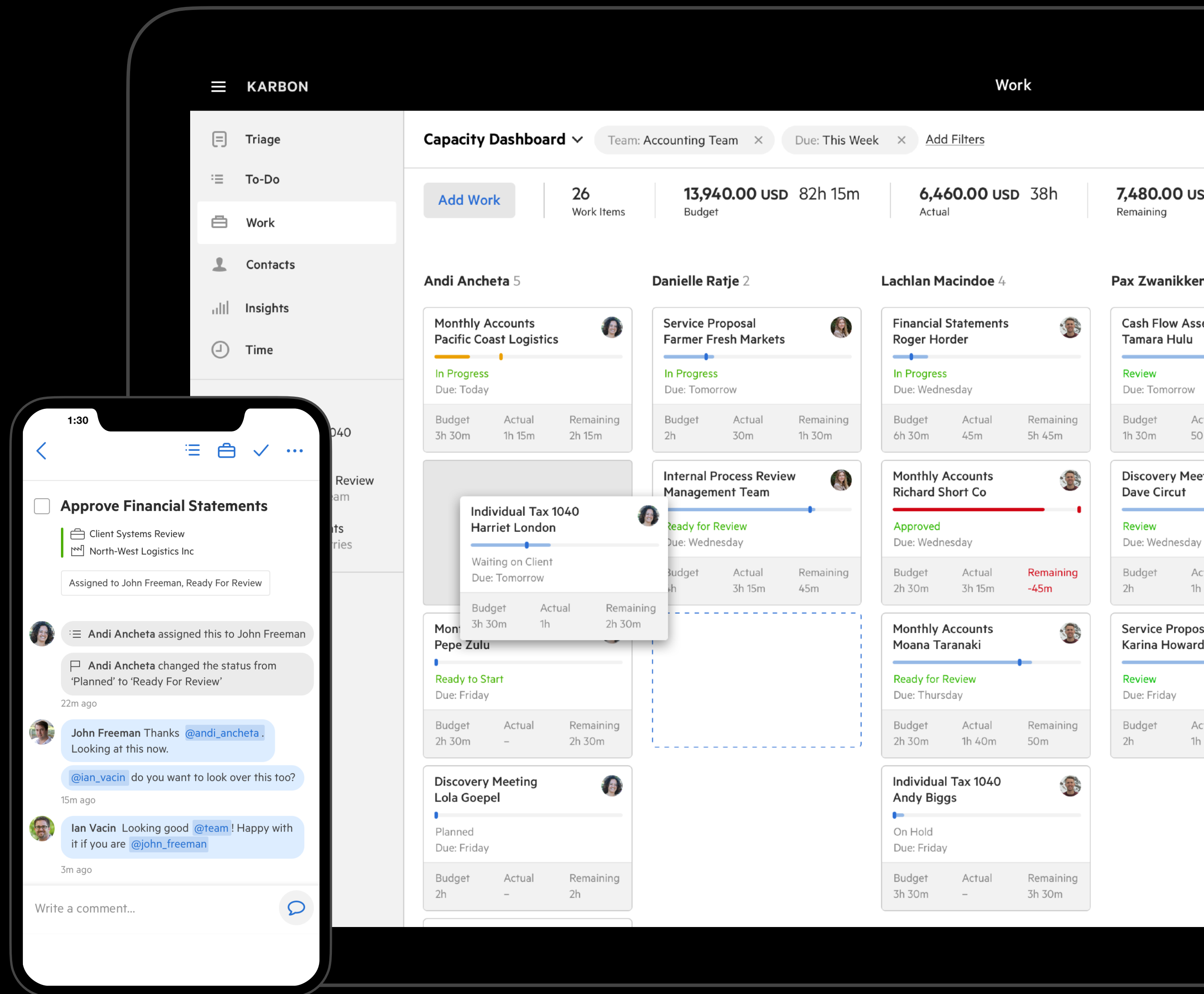
- 1. Close down any open apps.**
- 2. Ask and we'll answer.**



Work Management Software *for* Accounting Firms

karbonhq.com

GET STARTED





Karbon Annual Service Plan

Be guided by your dedicated account manager to gain maximum value from Karbon.

- ✓ Quarterly business reviews
- ✓ First access to features
- ✓ Data updates & reporting

Speak to your Customer Success Manager or refer to karbonhq.com/services for pricing or more details.

BOOK NOW

What's Included

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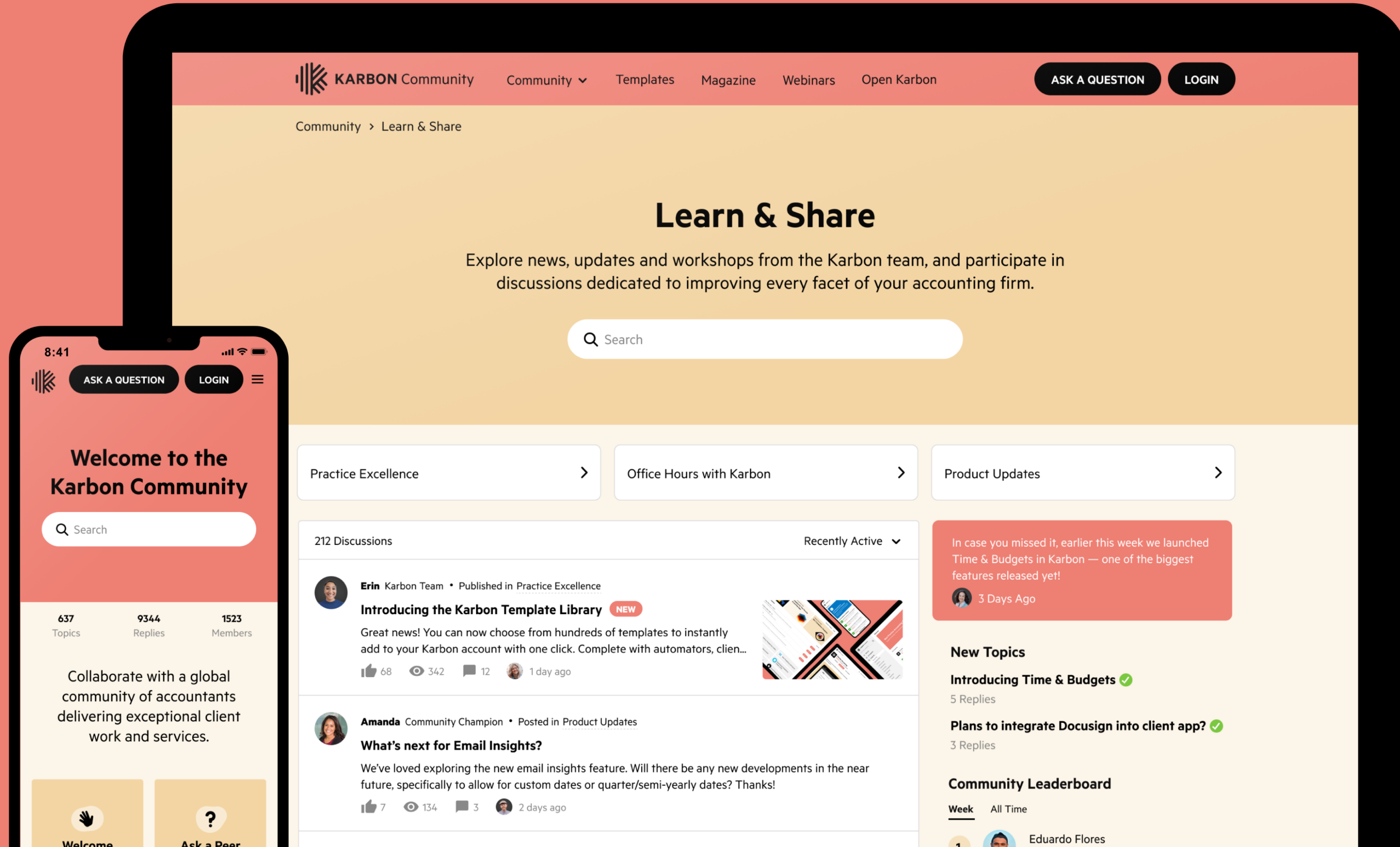
Includes

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Join the discussion: community.karbonhq.com



- 1. Practice excellence**
- 2. Health score**
- 3. Scorecard**
- 4. Usage statistics**

“Our goal was to determine a way to identify the relative strengths and opportunities for a firm so they could take actions to better themselves and improve the outcomes for the firm.”

— Ian Vacin, Karbon, Chief Customer Officer



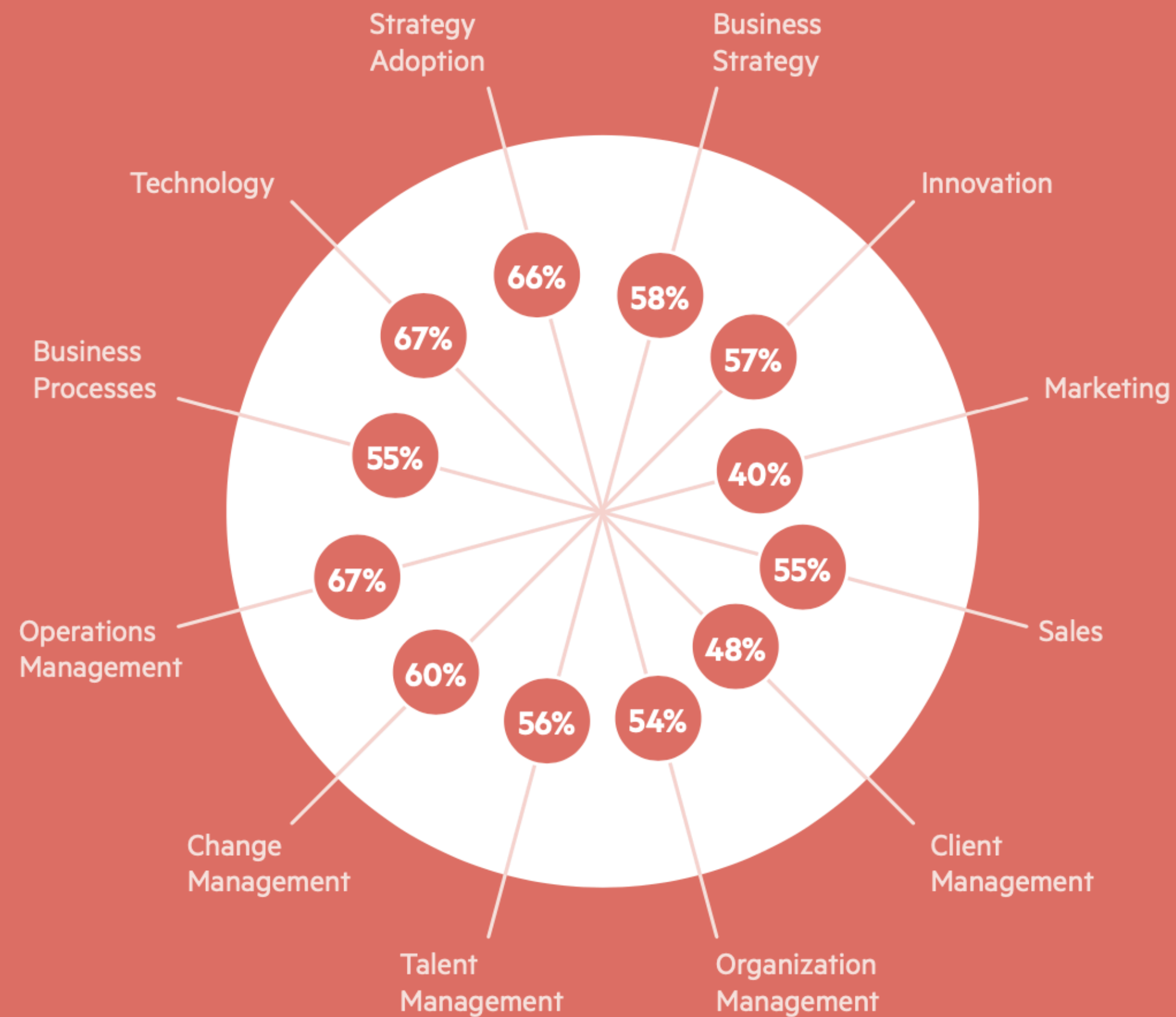
The four dimensions of practice knowledge



Built on top of accounting technical expertise.

Practice Excellence scores for the average firm

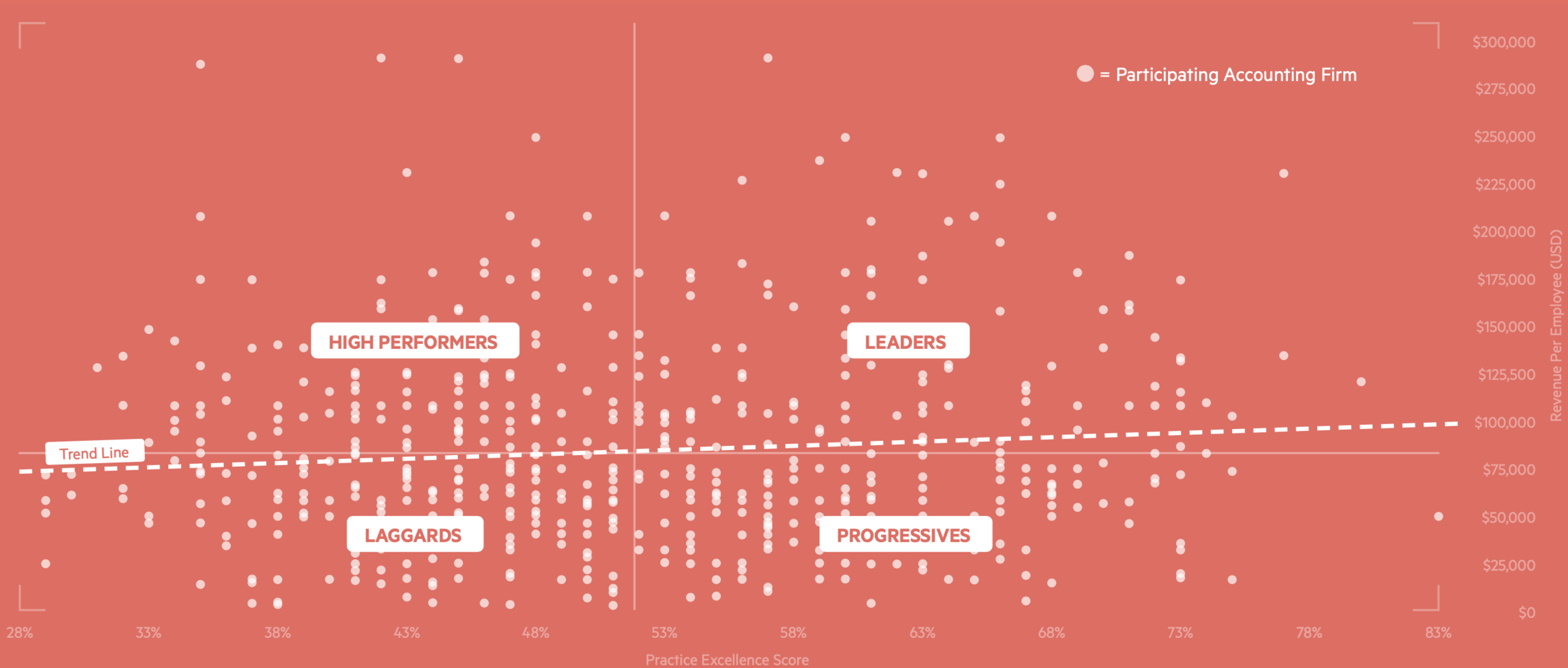
AVERAGE PROFICIENCY ACROSS
FIRM COMPETENCIES



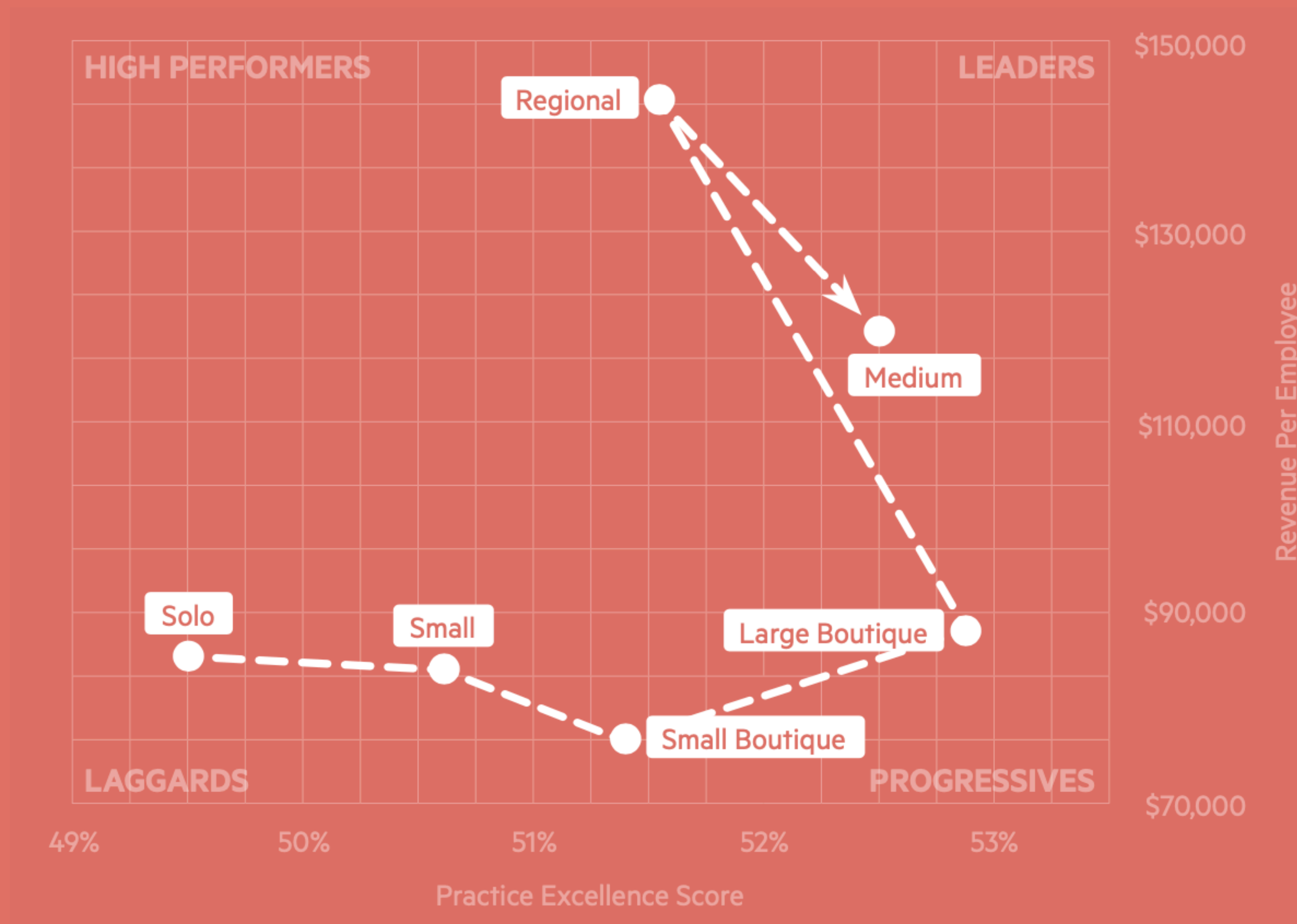
AVERAGE PROFICIENCY ACROSS PRACTICE
EXCELLENCE PILLARS



Karbon Magic Quadrants of Accounting Firms



Karbon Magic Quadrants of Accounting Firms (by Segment)



Key Findings

1. **Systems thinking:** While single actions help, the collective view is required.
2. **Growing pains:** Be mindful of the two speed bumps in the road. Size matters.
3. **Innovate or else:** The strategies that win today won't be the same tomorrow.
4. **Pick your side:** You are either in the haves or have nots. Don't get left behind.
5. **Drivers of change:** As your capabilities grow, your focus (and mix) shifts.
6. **Location matters:** Where you live plays a part. Go Canada!
7. **Seek expert help:** Sales & marketing is a struggle for all firms.
8. **Implement tech now:** It only gets harder the bigger / older your firm gets.
9. **Never set & forget:** Processes take a backseat only to re-emerge after neglect.
10. **Big impact but under-utilized initiatives:** Some things are only done by the best.

Audience Poll





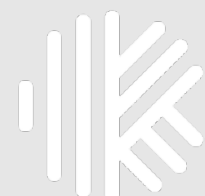
DOWNLOAD FOR FREE

Take the assessment:

karbonhq.com/get-scorecard

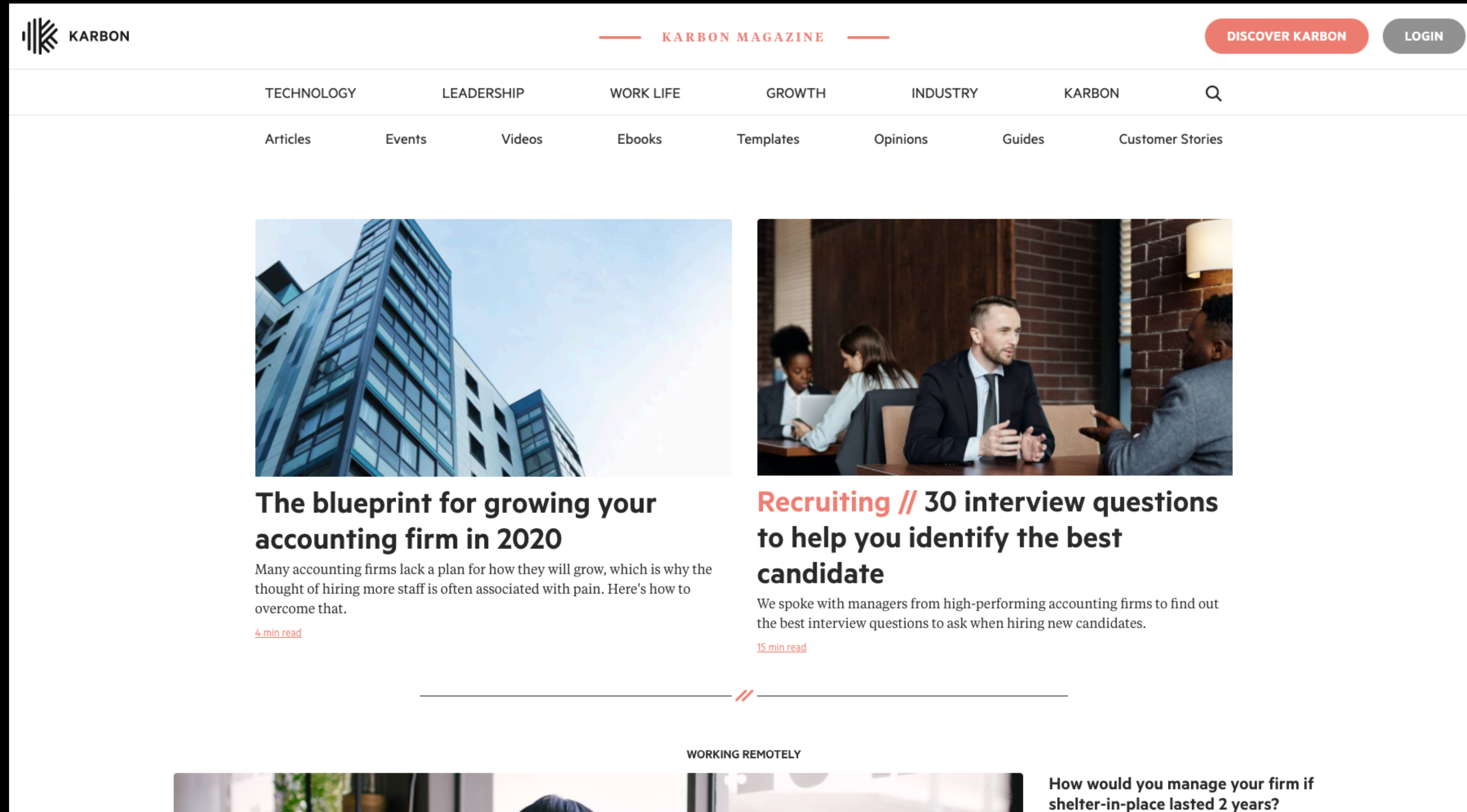
Download the report:

karbonhq.com/practice-excellence



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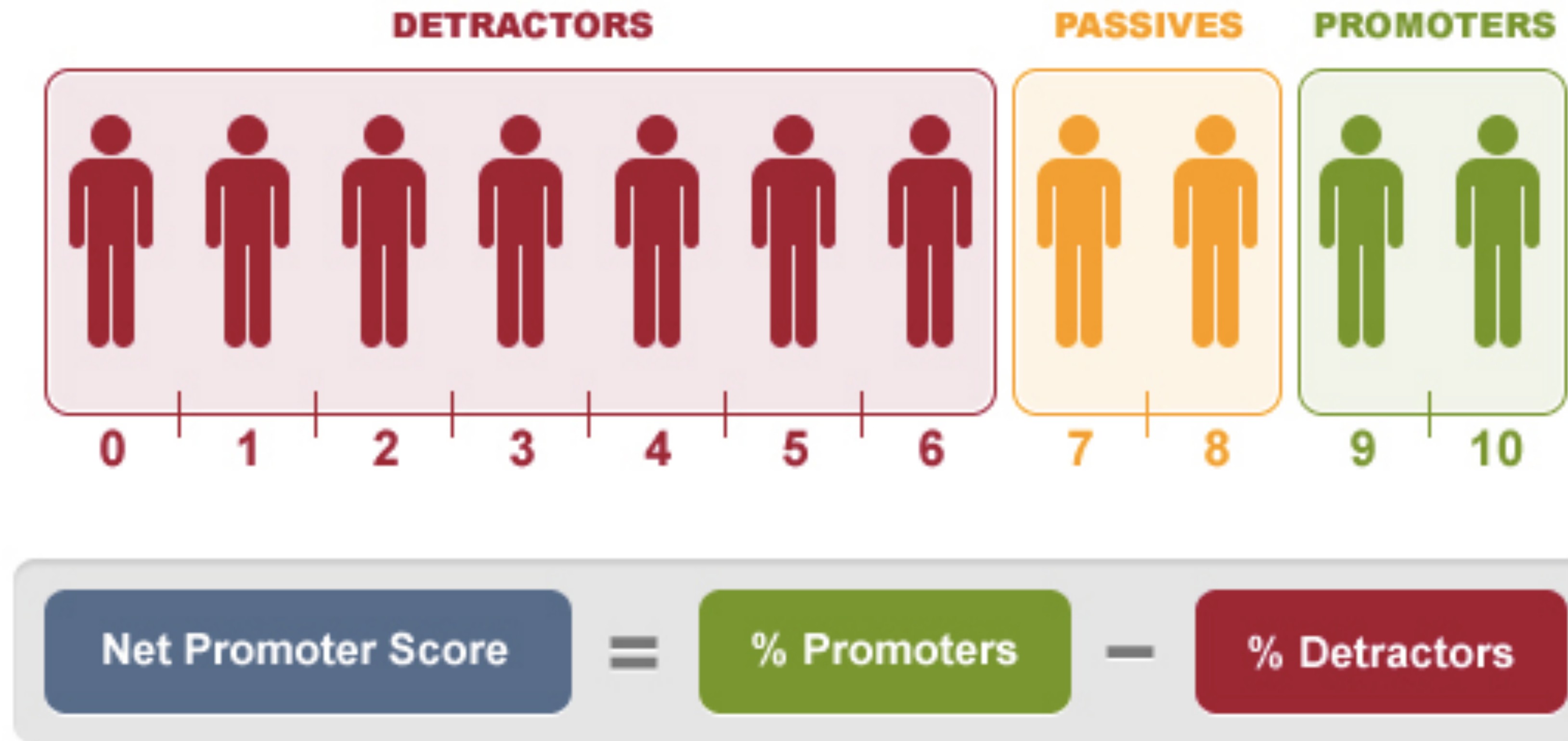


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Lag vs. leading measures

Net Promoter Score (NPS) vs. Health score

Which customers are satisfied and why?



How likely is it that you would recommend our company to a friend or colleague?

“Managing a company by looking at financial data (lag measures) is the equivalent of driving a car by looking in the rearview mirror.”

— Chris McChesney, Author of *4 Disciplines of Execution*



Comparing Lag vs. Lead Measures

	Lag measure	Lead measure
Question	Have you achieved your goal?	Are you likely to achieve your goal?
What	Metrics	Actions
Vantage point	Reactive	Proactive
Control	Not influenceable	Influenceable

Summary: Lead measure must be predictive and influenceable.

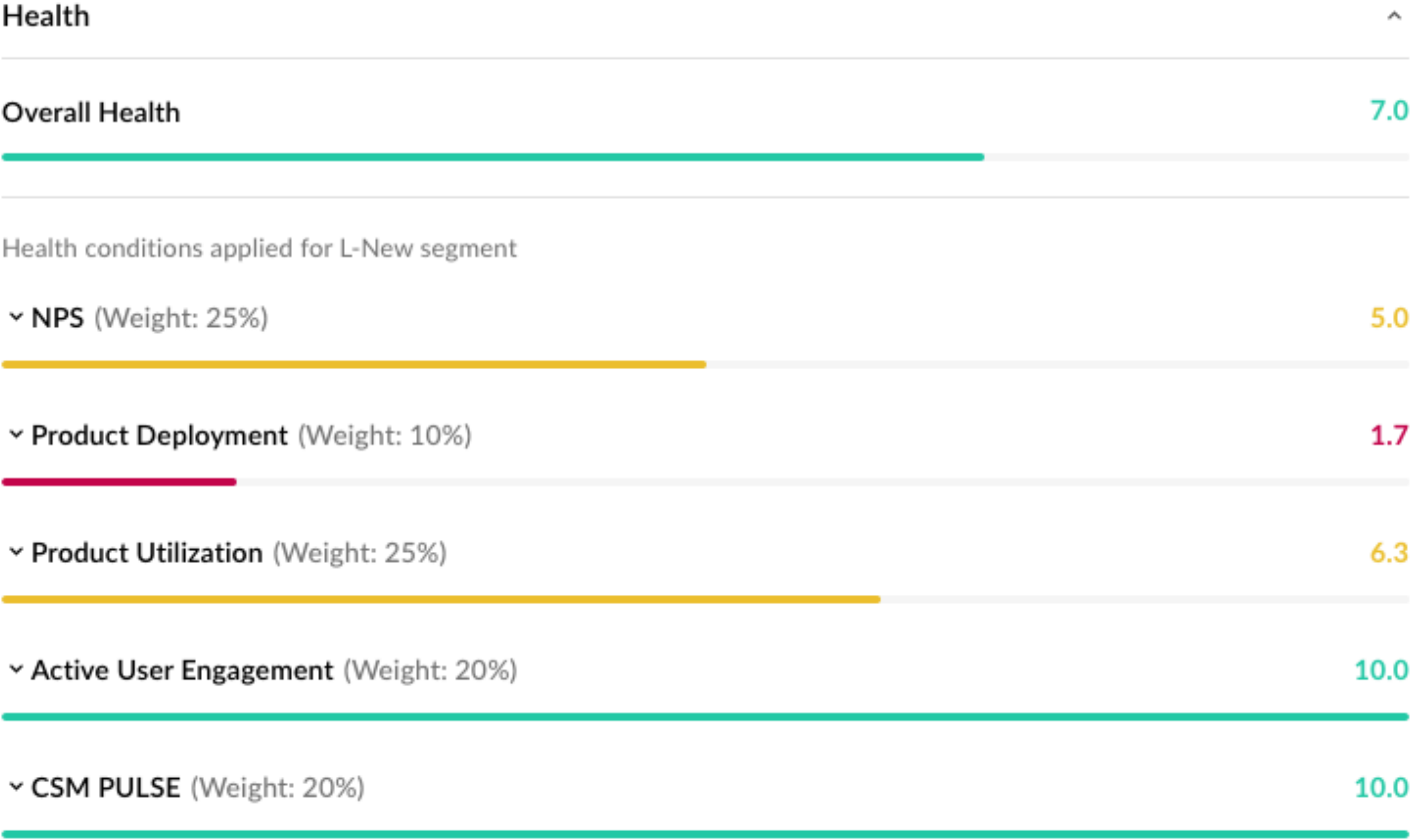


How to calculate a health score?

$$CH = (CO + BO) * CX$$

- **CH**: Customer Health
- **CO**: Customer Outcome
- **BO**: Business Outcome
- **CX**: Customer Experience





Request your Karbon health score: support@karbonhq.com

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Alignment

Realization of value is mutually beneficial.

Audience Poll



9 out of 10 customers say that Karbon
gives them **more visibility and control**
over their task, work and outcomes
than ever before.



On average, Karbon **saves every
employee 13 hours each week.**



Productivity per employee **increases**
by 21% with Karbon.



For the average firm using Karbon
for 2.5+ years, **total time saved
increased by 28%.**



Product deployment

Combination of feature usage + user confidence.

Karbon scorecard

Karbon Optimization Score Card for: Sample Company		Your Score:	69%
		Avg. Firm Score:	57%
Biggest areas of improvement from optimization efforts			
Indicator	Why it helps you	Recommended Action Plan	
Contact Types (Contact Types, Organizations, & People tabs)	Contact Types allow you to filter work by groups that are meaningful to your operations. Each contact can belong to only one type, so think about mutually exclusive groups when configuring. Then, make sure each organization is assigned to the correct contact type. For example, organizations and client groups might be divided by geographic region, service type, or frequency of service. You could also have them set for people contacts to identify decision makers, billing contact, etc. https://help.karbonhq.com/en/articles/1524453-contact-types-defaults	There are currently 16 different contact types setup for use. 89% of clients and 0% of people are categorized into contact types. Non default contact types: Auditor, Churned, Client - Active, Client - Active - Catch Up, Client - Active - Subsidiary, Client - Inactive, Client - Inactive - Delinquent, Client - Onboarding, Client - Unresponsive, Primary Contact, Secondary Contact, Supplier, Tax Professional, Tertiary Contact.	
Complete User Profiles	A completed user profile makes it easier to identify your self and others (via your picture), identify who can do what work (e.g. role) and look professional when emailing those outside of Karbon (by adding your email siganture). https://help.karbonhq.com/en/collections/102054-settings#your-user-profile	15% of user profiles have been updated.	
Auto-Share emails to/from clients	Automatically add all client emails into the client timeline for maximum visibility across the firm. This must be turned on individually by each user: https://help.karbonhq.com/en/articles/2806430-auto-share-email-to-and-from-contacts If necessary, specific communications can be kept private: https://help.karbonhq.com/en/articles/1524597-keeping-emails-private	7 colleagues have autosharing emails turned on and 103 colleagues don't have it turned on.	
People Contact Cards tab	preferred name designated Review for general completeness of client data (email address in particular). Also, it is best practice for all "people" contacts to be connected to the organization(s) they are associated to.	Tune Up	93% of people have a preferred name designated.
Client Groups & Client Group Members tabs	Not relevant for all firms, but if you serve multiple organizations that roll up under a single ownership or communication structure these groupings are a great way to view consolidated timelines and work filters. Create the group name on the 1st tab & define its members on the 2nd.	Tune Up	95% of people have a listed email. 89% of your organization contacts have at least one person contact connected to them.
	Job Roles are a powerful way to help make your work templates more evergreen and to create flexibility in assigning work and managing	All Good	There are currently 63 client groups setup comprising 300 clients. 17% of you clients are members of client groups.



Request your Karbon Scorecard: support@karbonhq.com

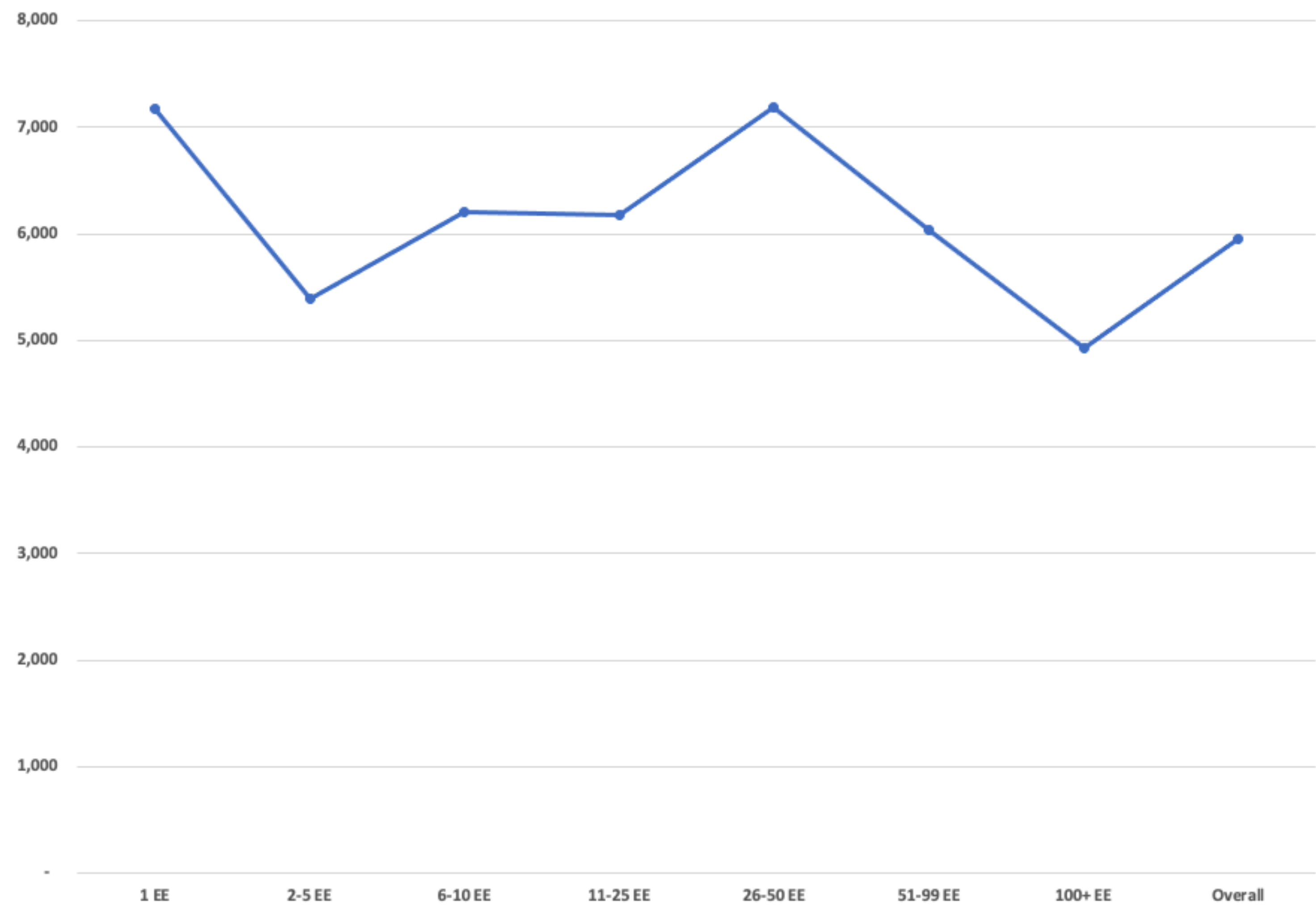
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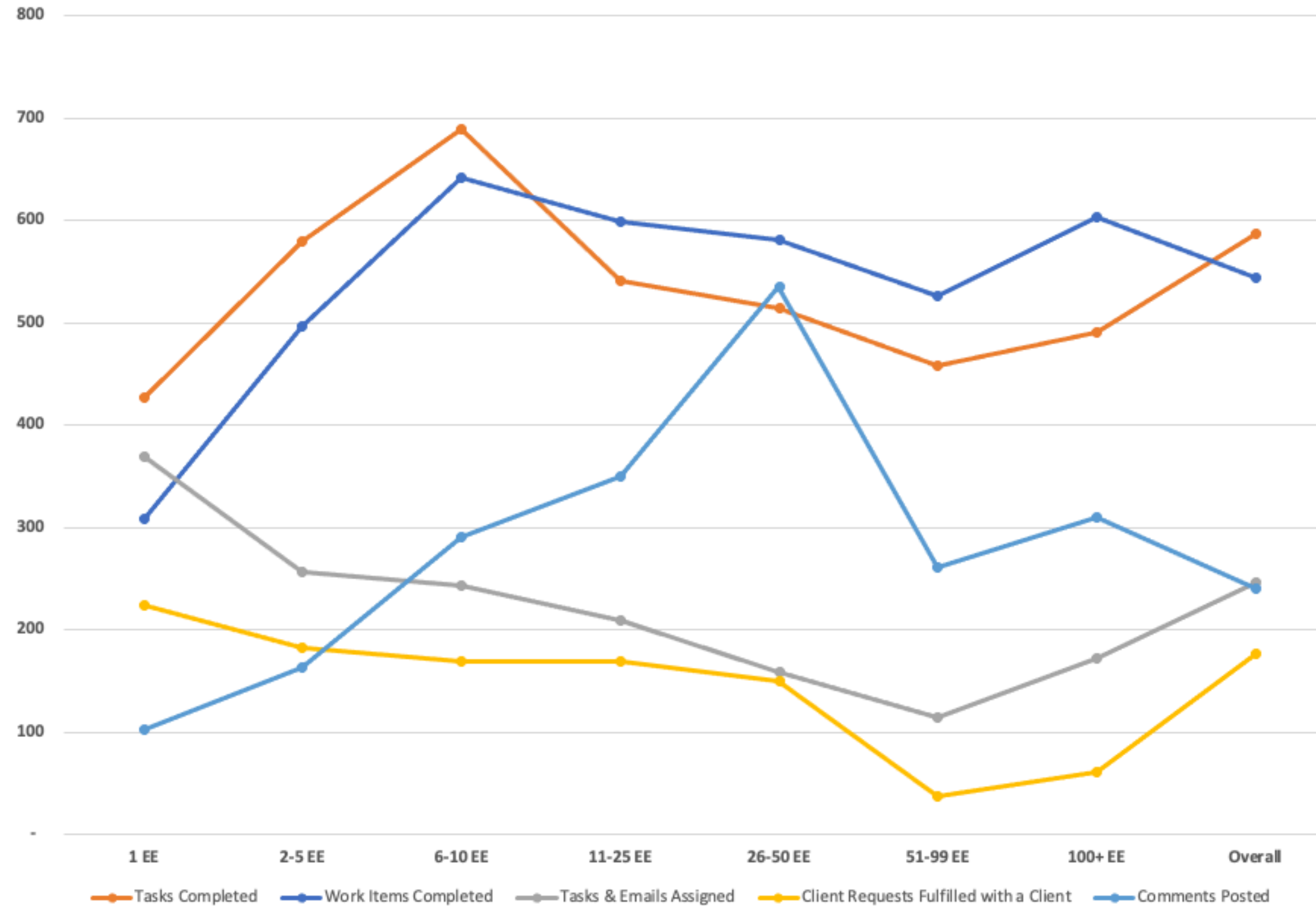
Usage statistics measurements

- **Triage activity:** Emails & Notifications Cleared
- **Task activity:** Tasks Completed
- **Work activity:** Work Items Completed
- **Delegation:** Tasks & Emails Assigned
- **External collaboration:** Client Requests Fulfilled with a Client
- **Internal collaboration:** Comments Posted

Average YTD emails / notifications cleared



Average YTD activity



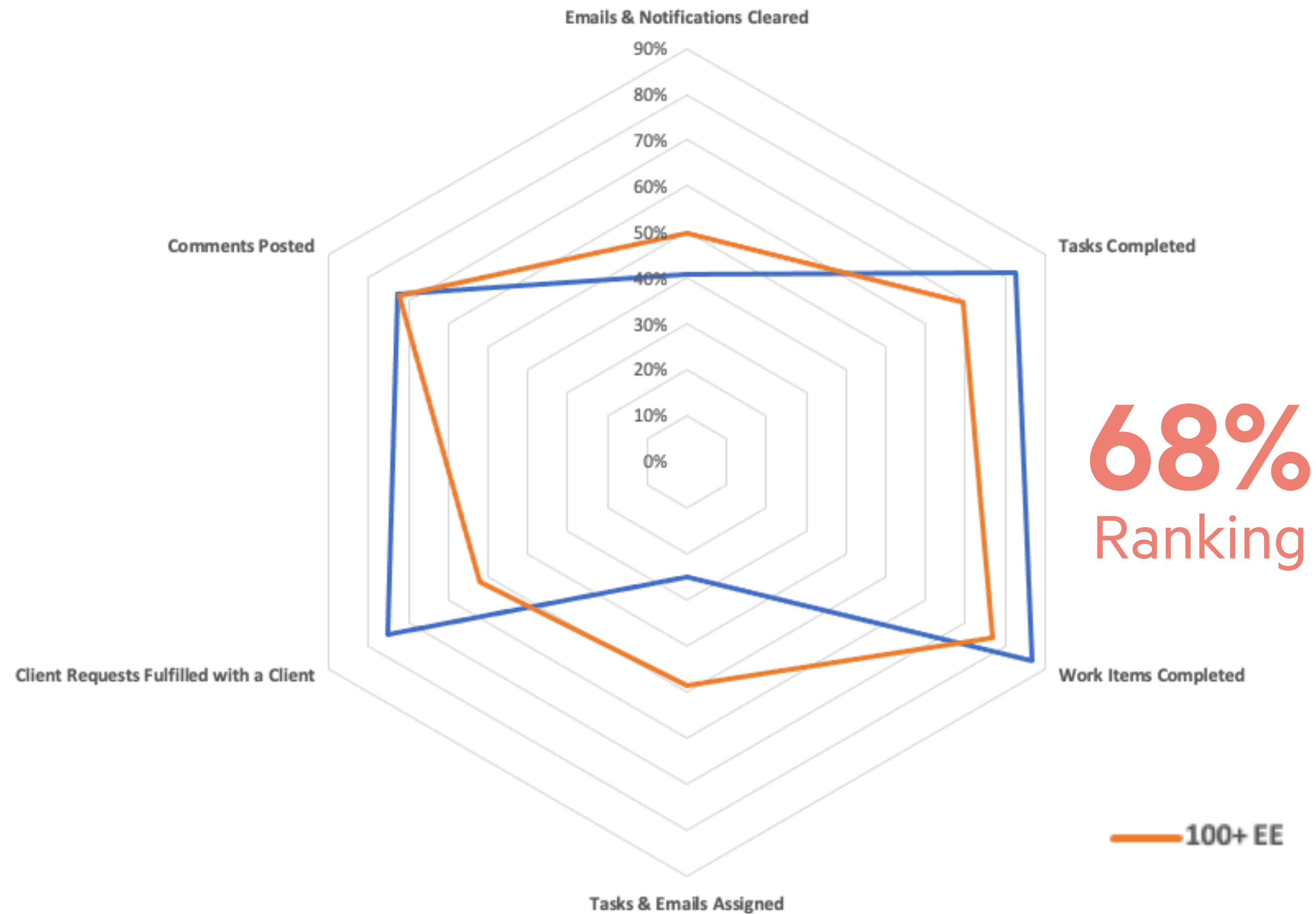
Firm ranking based on activity

68%
Ranking

	Emails & Notifications Cleared	Tasks Completed	Work Items Completed	Tasks & Emails Assigned	Client Requests Fulfilled with a Client	Comments Posted
Sample Company	41%	83%	87%	25%	75%	73%
100+ EE	50%	69%	77%	49%	52%	73%



Firm ranking based on activity



Individual statistics per firm

	Emails & Notifications Cleared	Tasks Completed	Work Items Completed	Tasks & Emails Assigned	Client Requests Fulfilled with a Client	Comments Posted
	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total
Average:	53,132	4,252	4,055	1,657	535	2,810
	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total
Firm Total:	72,589	7,315	2,514	6,274	622	3,911
Individuals:	10,605	773	766	316	115	567
User ID	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total	YTD Total
cab1f404-d2a3-4699-a077-ad2a719d6001	1,088	-	-	2	-	20
7d385549-a192-482a-b058-8a938c2ff531	21,954	212	817	1,207	220	1,591
89b10a7a-6908-4765-95b9-8d9bdbac1eb2	1,295	154	1	247	14	102
06b3a18a-a871-4f7e-bf81-0b4f4edd3117	22,809	994	1,112	1,018	153	1,222
80f2bedb-65a7-4a24-9632-7a7823996d1f	2,025	179	-	83	5	66
baab6835-0c7e-4980-9e77-18c5e8fc73df	11,751	3,303	408	2,071	128	615
d5b9bff9-db31-48ae-8c9c-06a5d54637be	11,667	2,473	176	1,646	102	295



Audience Poll



Get your usage statistics

Email a Karbon CSM: support@karbonhq.com

Wrap up

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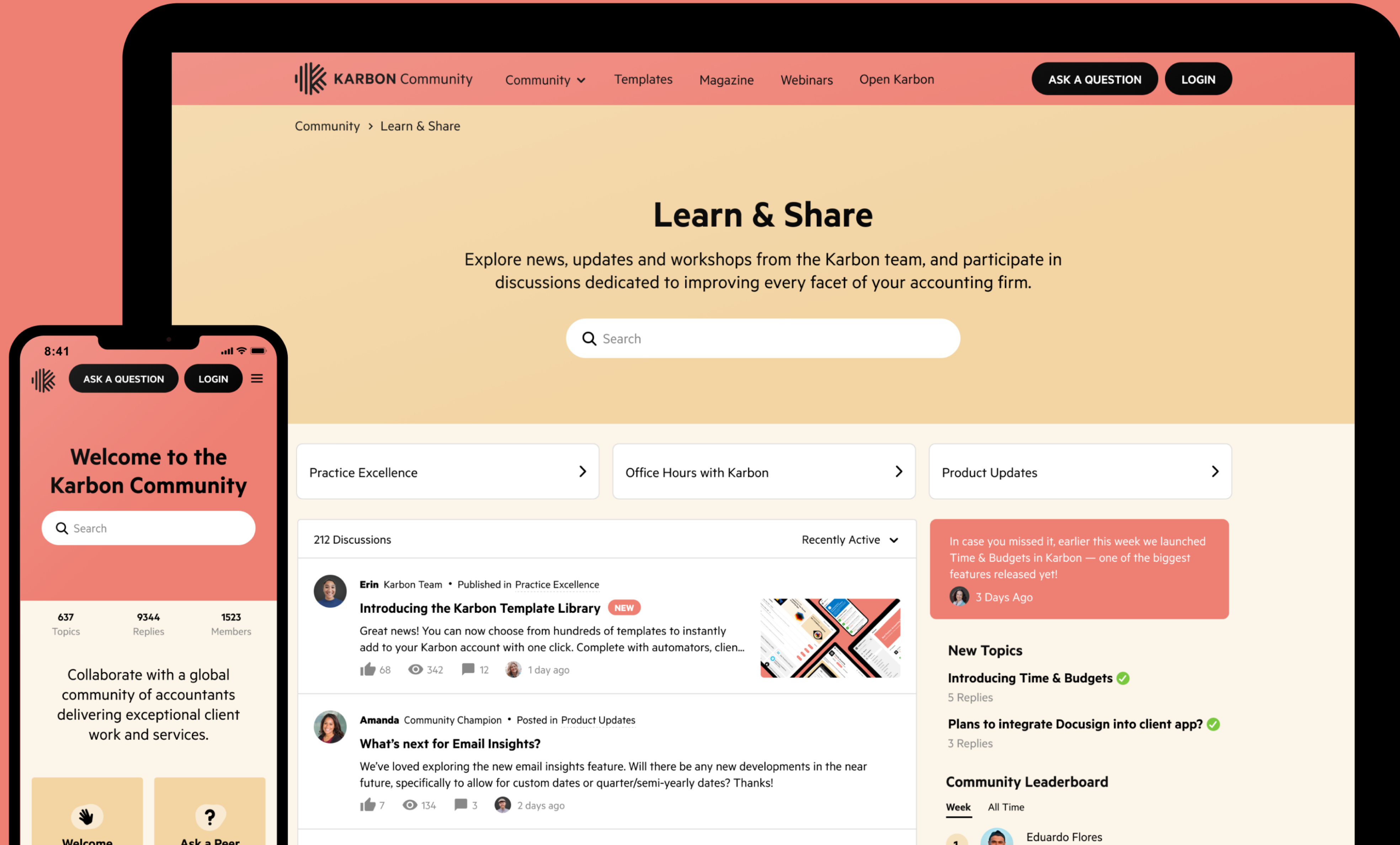
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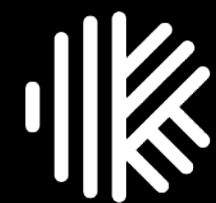
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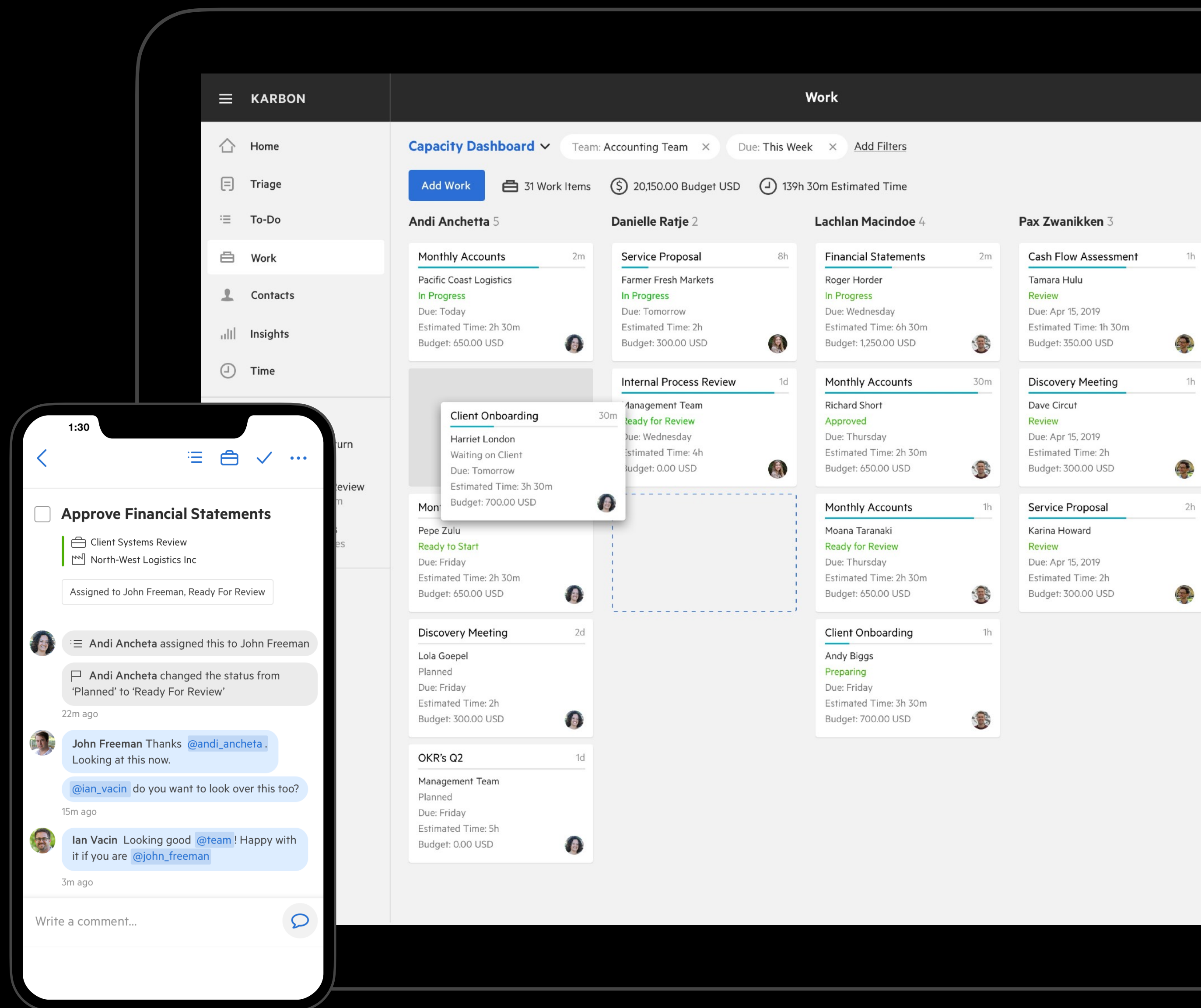




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Questions?

Thank you

Get started at karbonhq.com

Follow us on twitter [@KarbonHQ](https://twitter.com/KarbonHQ)

