February 6, 2025

Young Professionals Q1 2025 Quarterly Call

Discussion with Dave Mundy

LEA global

Rising Star Association

2022 WINNER

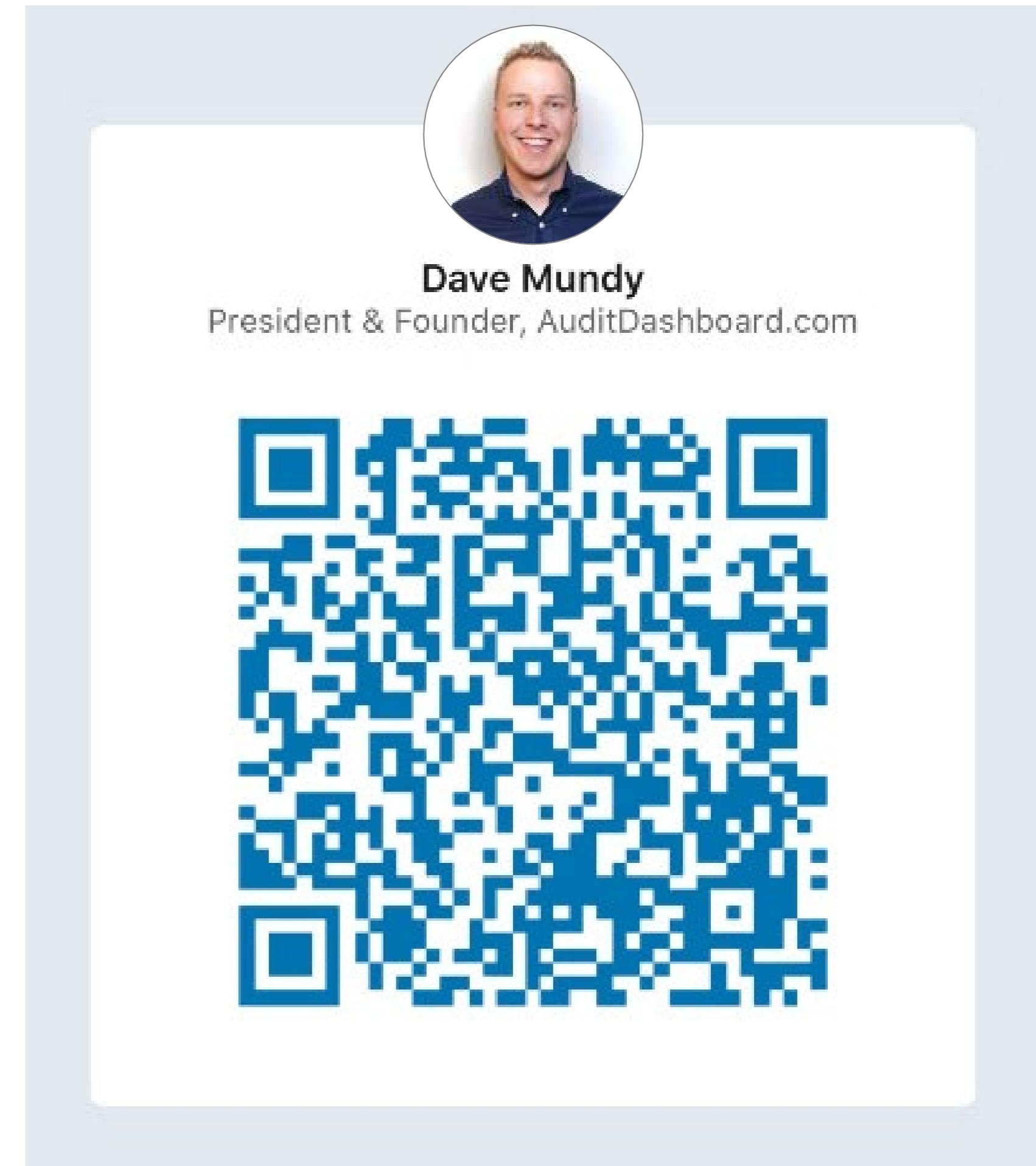INTERNATIONAL ACCOUNTING BULLETIN

Agenda

- Introduction and career background
- What is AuditDashboard?
- Technology Q&A
- Attendee Q&A

Introduction

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Dave Mundy is the President & Founder of AuditDashboard.com, a leading collaboration solution trusted by thousands of tax, audit, and cyber security professionals worldwide. After working at PwC and leading finance teams for a private equity asset manager, Dave founded AuditDashboard to simplify and improve how accounting firms and their clients interact, so teams have more capacity to provide proactive advice and complete higher-quality deliverables.

dave@auditdashboard.com

Dave Mundy
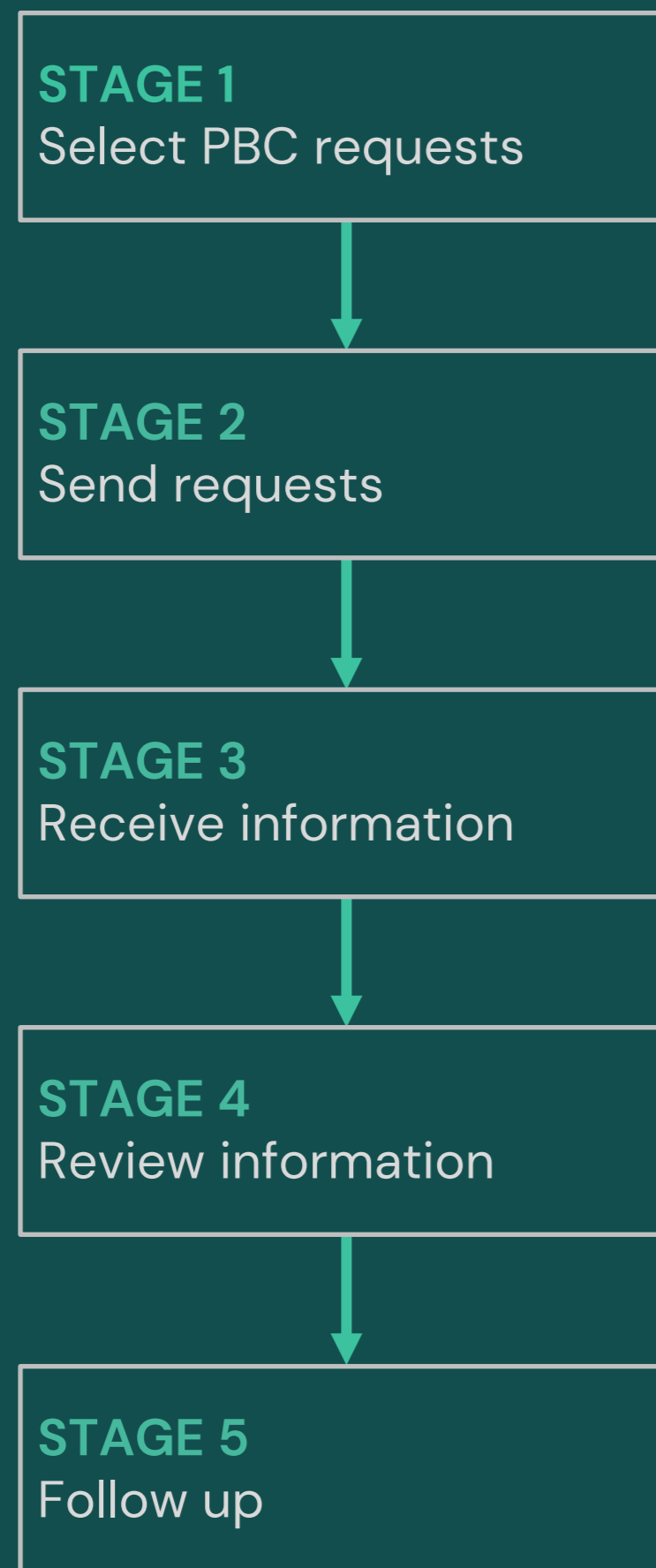President & Founder, AuditDashboard.com

THE DIGITAL CLIENT EXPERIENCE
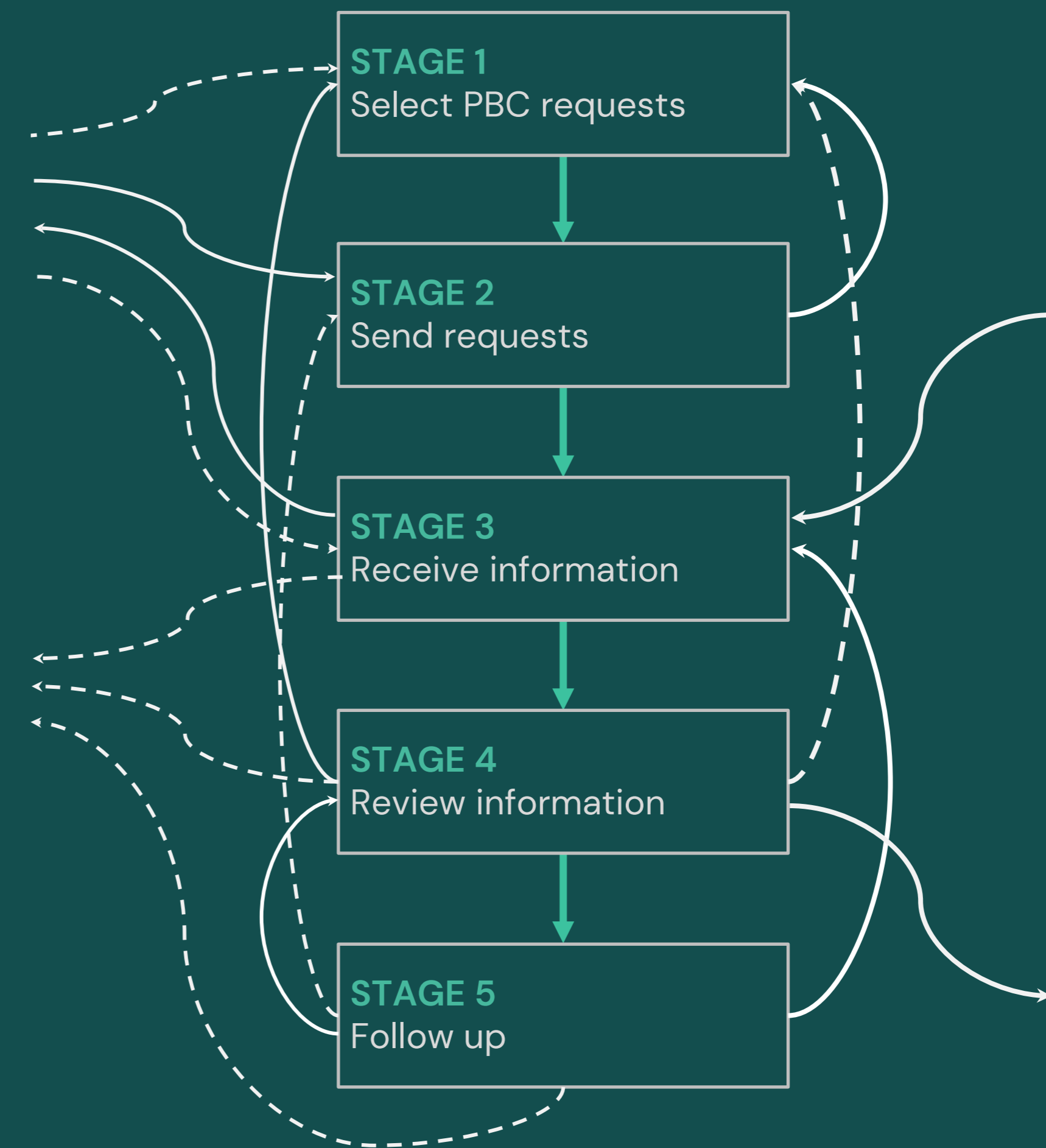
AuditDashboard

Prepared-by-client Collaboration | File Sharing | eSignatures | Practice Management Insights

How they think it works.

STAGE 1
Select PBC requests

↓

STAGE 2
Send requests

↓

STAGE 3
Receive information

↓

STAGE 4
Review information

↓

STAGE 5
Follow up

How it actually works.

STAGE 1
Select PBC requests

STAGE 2
Send requests

STAGE 3
Receive information

STAGE 4
Review information

STAGE 5
Follow up

Client Experience =

Lead Time
x
Client Punctuality
x
Firm Responsiveness
x
No. Touch Points

THE DIGITAL CLIENT EXPERIENCE

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Technology Q&A

- How do I evaluate if I am a public accounting "lifer," or if I should pursue industry or other specific passions? How do I take that leap?

- How do I set myself apart in my career and provide a foundation to become partner?

- What recommendations do you have for creating a pitch to management for a technology change?

- What dos and don'ts do you have for implementing software or technology in cases where you have seen the implementation succeed or fail?

Questions

Linked in

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