



LEA Global

# DigiCon 2023



Rising Star Association



INTERNATIONAL ACCOUNTING BULLETIN



**4impactdata**



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# We make growing your CAS practice easy



**4impactdata**



## **MISSION**

To change the odds for business owners so they have a greater chance to survive and thrive



## **VISION**

Have a positive impact on 1,000,000 people in communities by helping 10,000 companies survive & thrive



# Team (We've done this before)

## Founders



Eric Eager,  
CEO



Marty Carney,  
CSO



Chris Hagans,  
CTO



Previously built international analytics software company with successful exit



30+ years of analytics experience



National recognized analytics/ai team

# Advisory Team



## Patricia Asp

- 25+ years Service Master Sr. Executive served as SBU President, Lead Corporate Strategic Planning, Human Resources, and the global Six Sigma implementation. During her tenure ServiceMaster was, a \$7B global Fortune 500 Company with 5000 locations, named one of the most respected companies in the world
- CEO and Board Member in several multi-million-dollar owner and private equity companies
- Experience in scaling companies in wide range of sectors including healthcare, education, consumer services, +more



## Randy Johnston

- Nationally recognized advisor with 40+ years experience in strategic technology planning
- Top 100 most influential people in the Accounting Industry 18 consecutive years
- Accounting Technology – top 9 technology stars in the industry
- CPA practice advisor hall of fame



## Taylor Macdonald

- 25+ years expertise in building channels in software industry
- Top 50 channel champion - Top channel executive CRN-VAR Business
- Sr. Executive Channel Sales with Intacct (acquired by Sage 850M 2017)
- Helped grow Intacct revenue from 8M to 120M at time of acquisition



## Cliff Currie

- Startup & Incubator specialist in 30+ start-ups since 2000
- Datallegro Executive Team Member-completed successful acquisition by MSFT (270M)
- Board & Channel Executive successfully developed multi-million \$ partnerships with GE,
- Chevron, Accenture
- Co-Founded startup incubator in collaboration with Nationwide Insurance







AICPA®



CPA.com™

JUST ANNOUNCED:

# 2023 Startup Accelerator Cohort



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[Learn more](#)



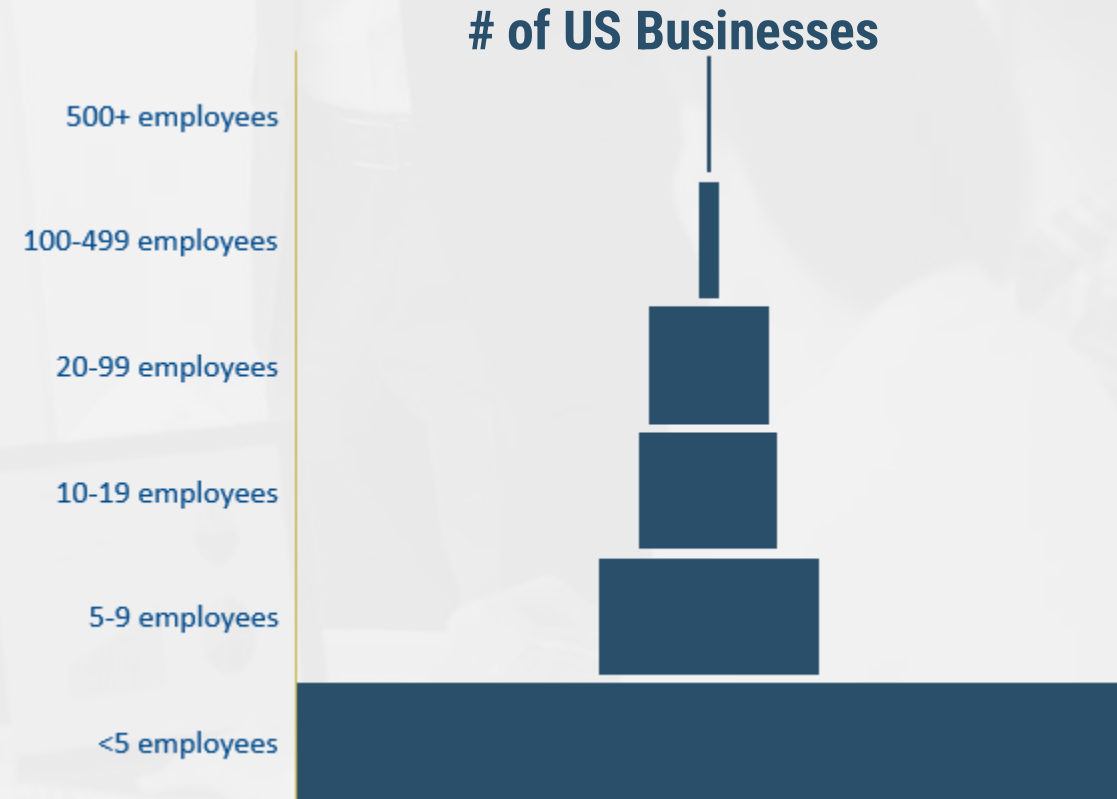
# Market Problem

**Over 15M companies in the US**

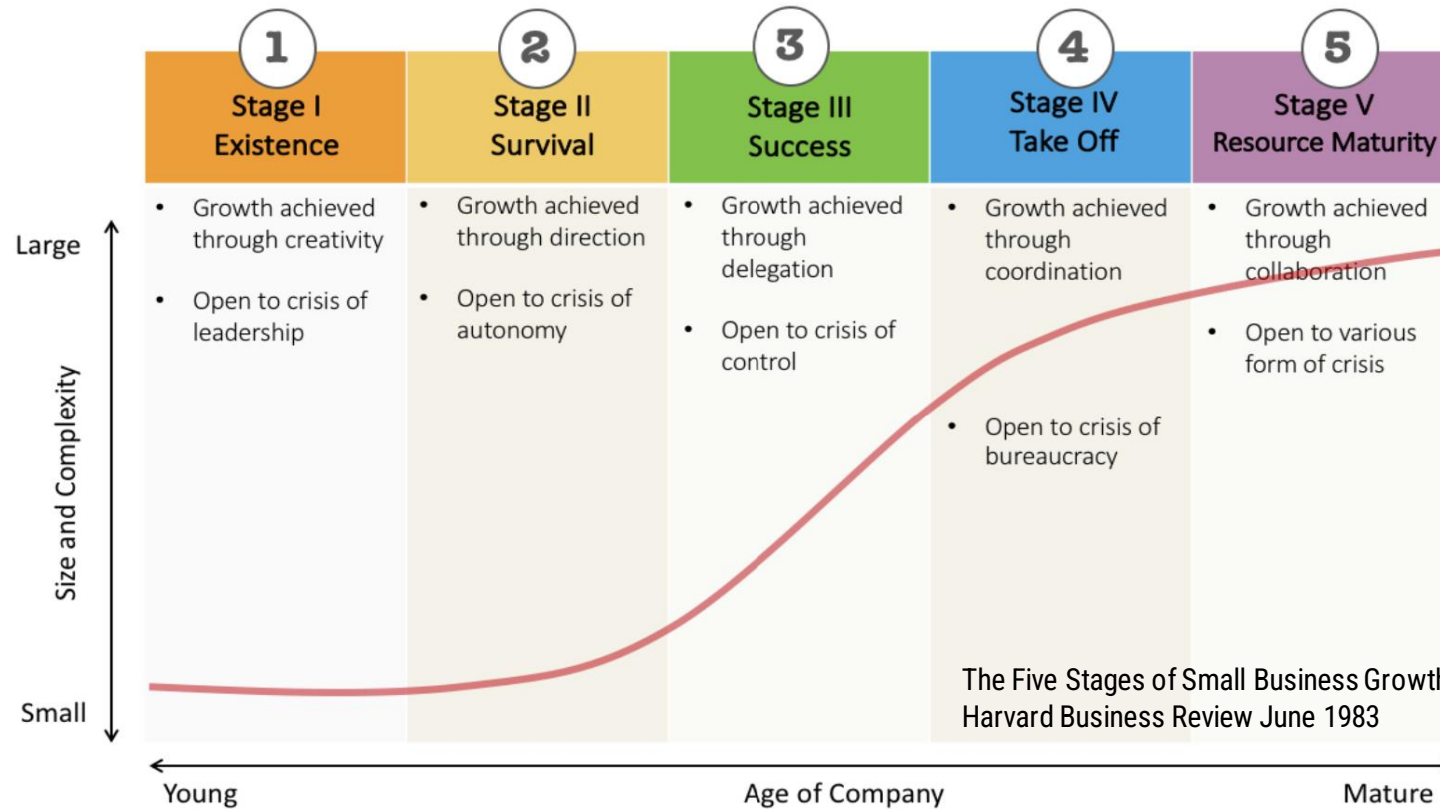
**50%** fail within first 5 years

**90%** will never grow bigger than 20-employees

**Why?**



# Market Opportunity



**Mentoring  
(Access to Wisdom)  
Increases Odds  
of Success By 70%**

Experience Gaps – Don't know what they don't know



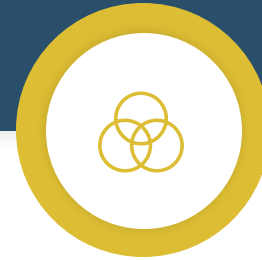
# The Answer (Knowledge as a Service)



**Codify the  
collective wisdom  
of experts**



**Combined with  
latest predictive  
and analytics  
technologies**



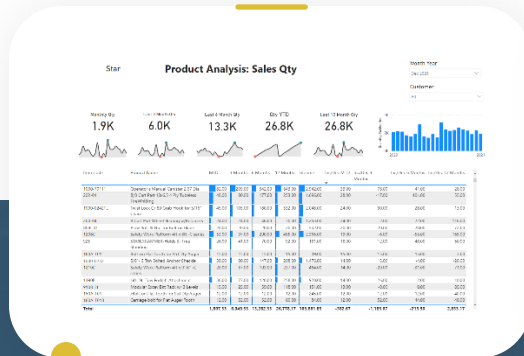
**Include data  
integrations from  
multiple sources**



**Make it  
affordable.**



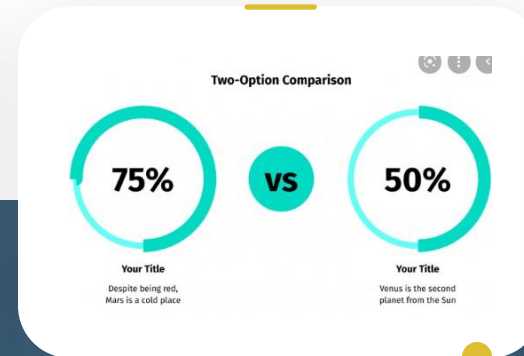
# Introducing 4ID Business Guidance System



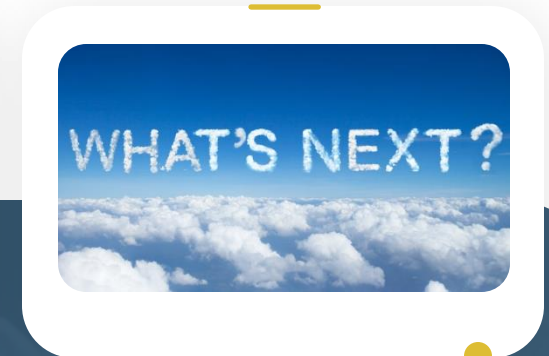
**Questions**  
Answer Critical  
Questions/Focus



**Needs Immediate Attention**  
Monitoring  
& Alerting



**Compare**  
Comparative Benchmarks  
Industry Standards



**What's Next**  
Predictive Analytics/  
What If



**Codified Wisdom  
of Experts**





# Easy to Grow Your CAS Practice



## Challenges



Staffing

Upskill staff - Codified Wisdom of Experts  
Built-in



Technology

Prebuilt on latest Analytics/AI platform



Compiling Data – Too Late - Reactive

1 Day Implementation – 4ID maintains data  
connection - Proactive



Limited to experiences of your team

Growing library of shared experiences



Growing a new business

4ID works to help position and grow practice

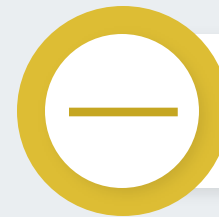


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## **4ID system is:**

- Delivery System of Business Knowledge & Experiences
- Continual Monitoring
- Early Warning Detection System
- Real Time Benchmarking
- Accounting System Agnostic
- Same Day Usability



## **4ID system is not:**

- Just a Fintech Solution
- Toolkit/platform
  - Budgeting and Planning
  - Financial modeling
  - Reporting
  - Dashboarding



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# Quick Product Overview





# 4impactdata CAS Quick Start



## 1. Identify 3 Clients

4ID and partner firm identify 3 clients



## 2. Prove It

4ID loads client data into the 4ID Business Guidance System



## 3. Review Results

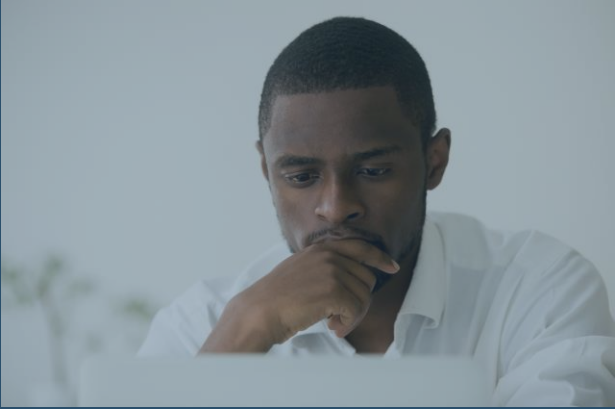
4ID team reviews results with your team. Train team on advisory



## 4. Individual Client Meetings

4ID team works with your team on client meetings

# Frequently Asked Questions



**How long will it take to set up? How much time is needed from my team?**

Answer: Usually 1-2 days with an estimated 1-1.5 hours from your team.

**Is there additional setup fees?**

Answer: No additional fees.

**Who is responsible for updating the data?**

Answer: The 4impactdata team sets up and maintains data updates.

**Is this for online systems only?**

Answer: Yes.



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# Is your firm interested in scheduling a demo?

Indicate 'Yes' or 'No' in the Chat Box