Welcome – This Webinar Will Begin Momentarily

Housekeeping Items

- This webinar will be recorded.
- The link to the recording and PowerPoint will be posted on the Events registration page on LEA's member portal post webinar. An email will also be sent to today's attendees, post webinar, with this information.
- Please use the chat box to share comments or questions.
- This webinar is eligible for 1 Continuing Professional Education (CPE) credit.
- Four (4) polling questions – will be initiated throughout this webinar to monitor engagement as required by NASBA standards.
- Your CPE certificate will be emailed to you in a couple of weeks.
- At the end of the webinar there will be a brief evaluation to complete. Please take time to complete this as your input is valuable when planning for future webinars.

Today's Presenter

David Kerr

Chief Customer Officer, Beeye

beeye

Harnessing AI, ESG and Employee Well Being that
you can attribute growth to.

Objectives for this session

How can your firm harness AI with practical examples

Communicate ideas and concepts to use ESG for boosting performance

Practical ideas to use employee well- being to grow your practice

01

Introduction to Beeye and your presenter

History & Key Figures

2014

Founded in Montreal

Beeye was established by 3 engineers and will soon boast 10 years of experience in planning and resource management.

2019

Fundraising and growth

Beeye raises funds from 30 investors, including from the audit, accounting, and advisory sector.

2022 —

International expansion through networks and associations

By establishing strong connections with major networks and associations, Beeye is expanding globally and solidifying its deep roots in the accounting, audit, and advisory sector.

Independent Member of **PrimeGlobal**   **HLB**   **PKF**   **BDO**   **LEA** global   **DFK** INTERNATIONAL   **AlliottGlobalAlliance**   mgi worldwide

2014

1.2m$

Continents

4

Countries

10+
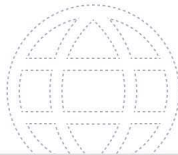
Years of experience

10

Employees in

U.K.
U.S.
Canada
France

Clients

300+

Networks & Associations

10+

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02

AI, ESG, Employee Well Being

Explanation of AI, ESG and Employee Well Being

Resourcing and Scheduling

Artificial Intelligence

Simulation of Human Intelligence

Automation | Speed | Skills and Preferences

ESG

Environmental, Social and Governance

Policies | Brand | Talent Attraction

Employee Well Being

Boost morale and productivity

Retention | Progression | Attendance
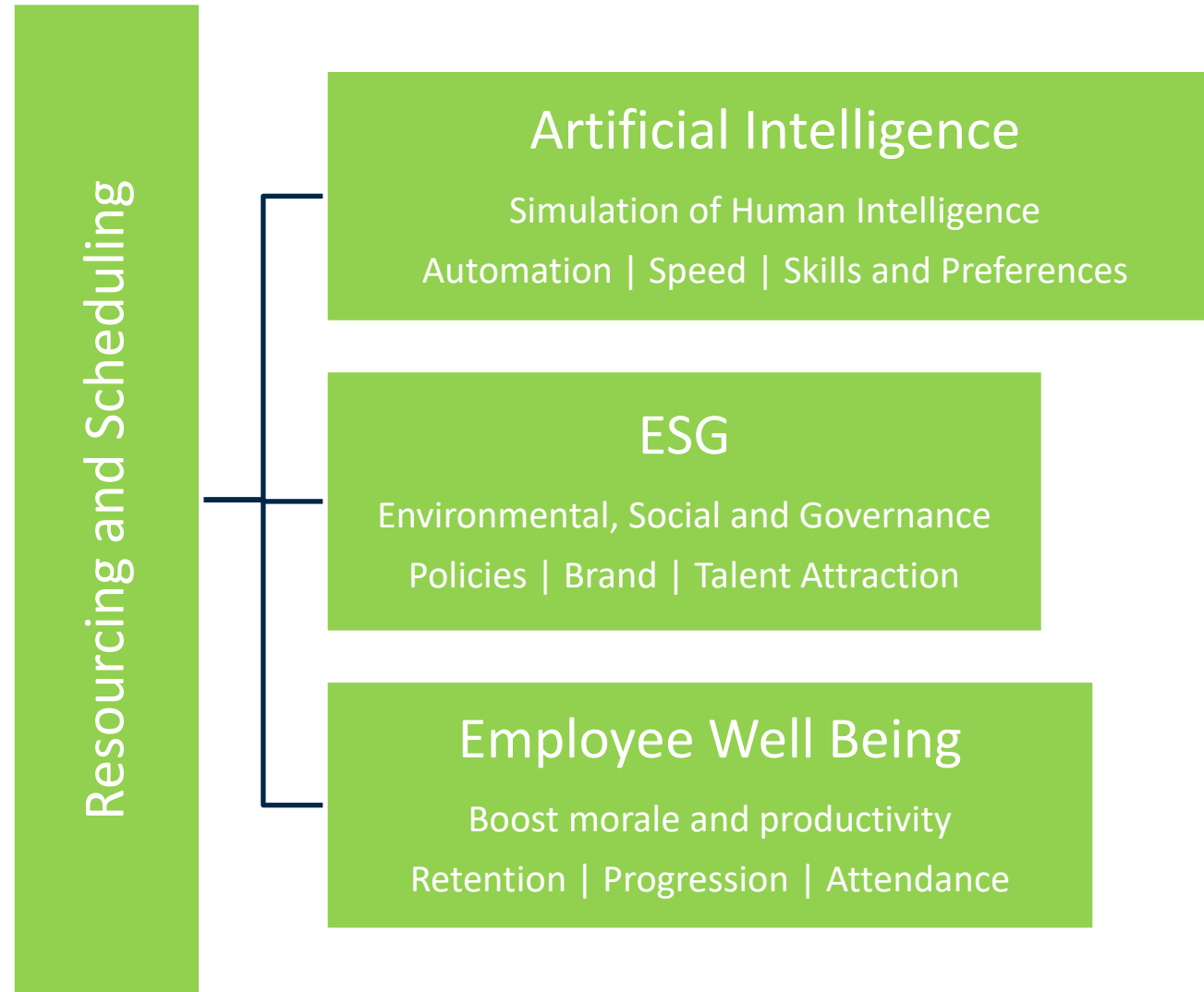
Collaborative scheduling

Get a complete view of ongoing and upcoming work, identify scheduling conflicts and fix them instantly

Scheduling shortcuts

Manage your schedule in a few clicks by relying on Beeye's intelligence to reschedule, shift or reassign work.

Conecom   8 H / D

- Reschedule
- Shift
- Reassign
- Lock
- Delete

Automated scheduling

Automatically schedule your team's work with Beeye's scheduling algorithm.

Remote work

Manage remote teams and coworkers thanks to advanced collaboration and workplace management features.

Smart History

Take past and future promotions into account when estimating the value of jobs.

Scheduling conflicts management

Immediately identify overloaded resources and periods so reallocate work.

Virtual resources

Assign work to placeholder resources as you wait for the right resource to be available.

Schedule lock

Lock bookings to secure resources on key assignments.

Team org chart

Create a management structure that matches your own organization.

Calendar synchronization

Push scheduling data to your favorite calendar apps such as Microsoft Outlook, Google Calendar, or iCloud Calendar.

Custom availabilities

Define custom availabilites for each resource to manage part time resources easily.

Skills & skill levels

Define skills for resources to assign tasks with increase precision and relevance.

Positions

Manage positions for your resources and easily analyse scheduling data along that dimension.

Bill & cost rates

Estimate work done based on bill rates and measure your margins and profitability.
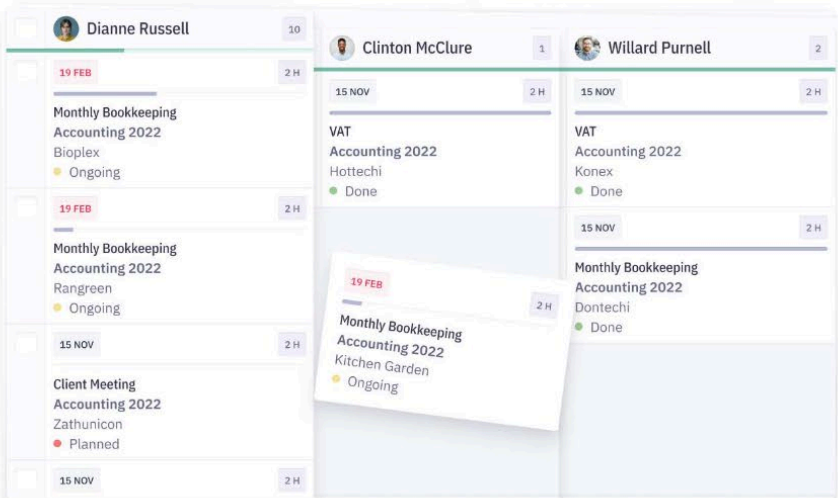
Task Management

360° Visibility on tasks with Kanban and table views

Get an immediate overview of work allocation and progress with the Kanban board, and a highly flexible view with the table view.

Dynamic dates

Recompute start dates and due dates for your tasks when changes happen to keep your tasks on track at all times.

Dynamic statuses & workflows

Change task statuses automatically based on your prefered rules to easily create workflows.

Recurring tasks

Easily create all of your recurring tasks with their start and due dates in one go.

Checklists

Describe your tasks step by step with checklists and measure their completion.

Opentech / Accounting 2024 / Monthly Bookke

Checklist

- ✓ Review A/P Report
- ✓ Pay Due Bills
- ✓ Reconcile Deposits from POS
- ✓ Review Uncashed Checks
- ✓ Follow-up with Client

Add

Late tasks

Better manage emergencies by keeping an eye on late tasks.

Unassigned tasks

Identify at-risk tasks that still need to be assigned an owner.

Unscheduled tasks

Ensure all of your work is properly scheduled.

Progress

Track task completion across all of your engagements.

Comments

Collaborate on your tasks through comments.

Budgets

Define time budgets on your tasks to schedule them automatically.

Smart resource assignment

Select the perfect resource based on their experience and skills.

Template library

Start from a set of predefined templates covering all specialties and workflows.

Smart templates

Provide structure to your engagement with standardized tasks that adapt to your clients through smart template rules.

Time entry

Enter time directly in your scheduling tool to simplify comparisons between budgeted, scheduled and actual time.

Accelerated entry

Import times from the schedule to speed up time entry.

Alerts

Send reminders to ensure a rigorous time entry process.

Logged	Workweek									
42 h	**40 h**					• To submit	⏵ Submit			

September 2022														
🔍 Search	MON	1	TUE	2	WED	3	THU	4	FRI	5	SAT	6	SUN	7
Total	8		8		9		9		8					
Audit 2022 Sterling Cooper 4 ⌃	8		8		9		9		8					
Review & Sign-off Audit Plan	8													
Complete preliminary review			8											
Prep for Phase 1 testing					9		9							
On-site testing									8					

Holidays

Automatically import national and regional holidays in your schedule.

Time off

Define time off periods to take them into account in your scheduling process.

Comments

Use comments during time entry to explain possible discrepancies during the approval process.

Time approval

Set up a simple and efficient approval process to validate time entries by comparing logged time and available time.

To submit	Awaiting approval	Approved	Late
1	**2**	**4**	**0**

🔍 Search   ☰ Filtrer   ☰ Grouper

	Employee	Period	Status
☑	Arlene McCoy	2 — 23 / 05 / 2022	• Approved
☐	Marvin McKinney	2 — 23 / 05 / 2022	• Approved
☐	Jane Cooper	2 — 23 / 05 / 2022	• Awaiting
☐	Albert Flores	2 — 23 / 05 / 2022	• Awaiting
☐	Cody Fisher	16 / 05 / 2022 — 23 / 05 / 2022	• To submit
☐	Guy Hawkins	16 / 05 / 2022 — 23 / 05 / 2022	• Approved
☐	Ronald Richards	16 / 05 / 2022 — 23 / 05 / 2022	• Approved

✓ Approve
⊘ Reject
◁ Send reminder
⏵ Force submission

Profitability tracking

Find every key profitability metric for all of your engagements.

Billable	Invoiced	Estimate at completion	
5 635,00 $	1 950,00 $	7117,50 $	+26%

Cumulative

Jan 2022 — Mar 20

— Billable

Billable	Invoiced	Estimate at completion	
5 635,00 $	1 950,00 $	4 620,50 $	-18%

Cumulative

Jan 2022 — Mar 20

— Billable
○ Future scheduled
◉ Actual

Jan F
2022
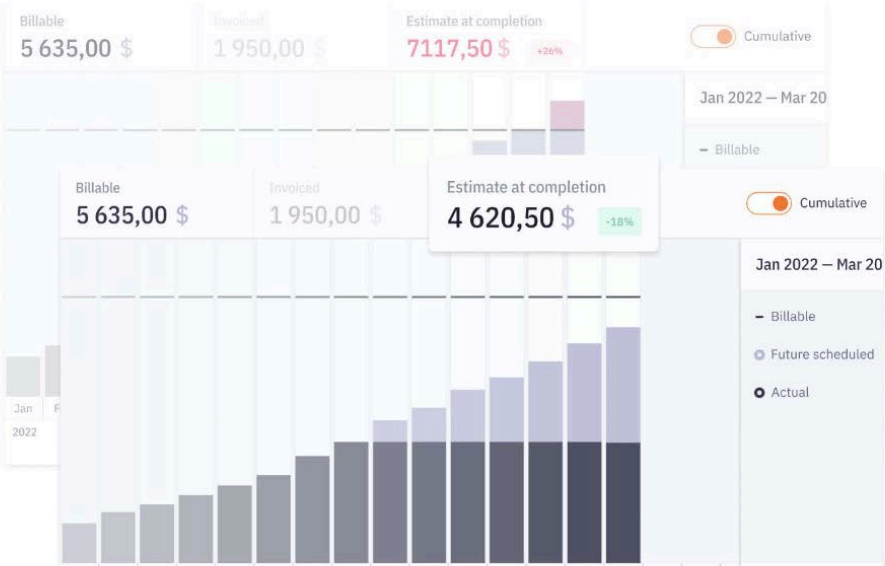
Custom performance indicators

Customize indicators in your engagement pages to reflect your priorities.

Variance analysis

Easily compare time and amounts budgeted, scheduled, and realized against your initial fees.

👥 Team	☰ Tasks	📄 Expenses					
Name	Status	Owner	Budget	Forecast	Actual	Future sched	Variance
			17,50 h 1 920,00 $	18,00 h 1 960,00 $	5,00 h 420,00 $	13,00 h 1 540,00 $	0,50 h 40,00 $
Bookkeeping	● Done	Savannah R.	1,00 80,00	1,00 80,00	1,00 80,00	0,00 0,00	0,00 0,00
VAT	● Done	Dianne R.	1,00 80,00	1,00 80,00	1,00 80,00	0,00 0,00	0,00 0,00
Payroll	● Done	Nicole G.	1,00 80,00	1,00 80,00	1,00 80,00	0,00 0,00	0,00 0,00
Reporting	● Done	Brooklyn W.	0,50 40,00	1,00 80,00	1,00 80,00	0,00 0,00	+0,50 +40,00
Review	● Ongoing	Audrey S.	2,00 200,00	2,00 200,00	1,00 100,00	1,00 100,00	0,00 0,00
Statements prep	● Planned	Matthew A.	12,00 1 440,00	12,00 1 440,00	0,00 0,00	12,00 1 440,00	0,00 0,00

Custom reports

Customize your reports by picking and ordering columns, filters, and groupings you desire.

Custom views

Save as many reports as you want with custom views.

Shareable views

Share your favorite views with coworkers.

Advanced filters

Create powerful combinations of filters for more complete views.

Groupages

Group information as you with to slice and dice it along the most relevant dimensions.

Smart roll forward

Roll engagements forward every year with the right data to adjust budgets and improve results year over year.
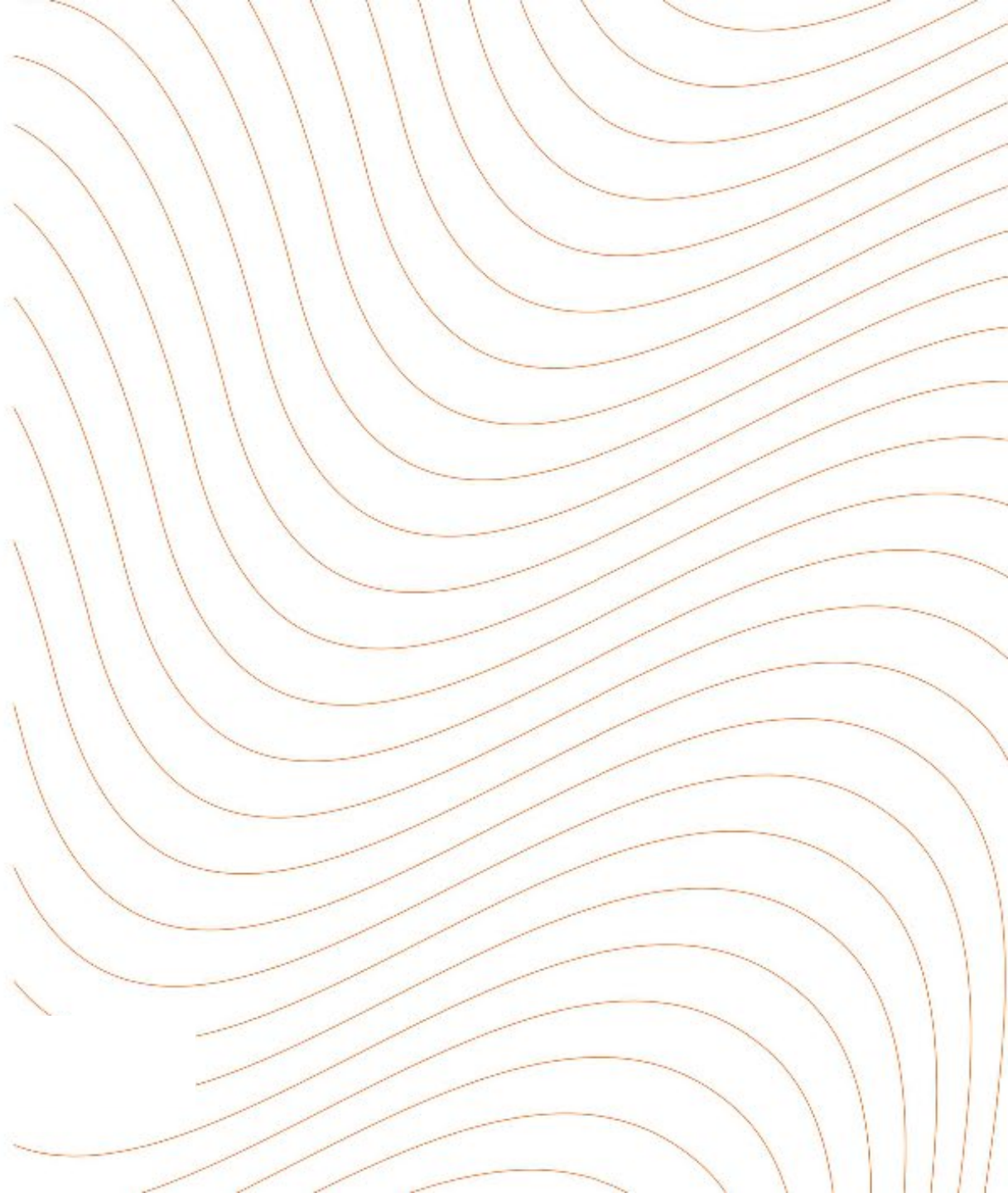
Microsoft Power BI Connection

Upload data from Beeye to Power BI to cross reference with all of your enterprise data and build powerful dashboards.

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03

Conclusion

1. Consider how you can automate you resourcing to free up capacity and boost productivity

2. ESG is coming, prepare by using scheduling to reduce Carbon footprint and give work to those is closest proximity and to build your brand as an employer.

3. Employee Well-being is key to staff retention. Give the right work to the right person using AI

4. Utilise all of these options to boost growth of your firm