

# Jetpack Workflow Lift 2020

the first digital conference for the  
jetpack workflow community

# Welcome to Lift 2020!



- agenda

- event etiquette

- between sessions

- event hashtag:  
**#JPWLift2020**

- social handles

**instagram: @jetpack\_workflow**

**facebook: @jetpack workflow**

**linkedin: @jetpack workflow**

**twitter: @jetpackworkflow**



# David Cristello

Founder/CEO at Jetpack Workflow

- Podcaster & author
- Book buying obsession
- Recent chess addict

# agenda

## Balance

- fireside chat
- future of work[flow]
- automation alley
- customer panel
- product reveal
- customer celebrations

# Jetpack Workflow: **What Do We Stand For?**

We wake up every day to help you to **do your best work.**

We aspire to build simple but powerful solutions to solve **painful workflow problems.**

Ultimately, we want you to deliver **high quality** client work that gets **done on time.**





# Fireside Chat

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Informal discussion about how to find balance in a world of uncertainty



# Krishna Pendyala

Founder & Chief Empowerment Officer  
ChoiceLatter

- MindfulNation Foundation
- IIT Graduate
- Diverse Career

# text "VALUES" to 33777

- Access your life space review
- Learn about the Judgment Quotient







# Workflow Maturity Model

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The transformational framework to gain more freedom, control, creativity, profit, and clarity.







Team

Business

Enterprise

Standard

Professional

Sole Proprietor

Small Firm

Large Firm

Everything  
you need at  
one  
affordable  
price

Steal IP and outsource

# Let's Simplify





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# Workflow Maturity Model



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# Workflow Mastery is a Skill.



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# Skills Need Building Blocks.



Stage 1

Stage 2

Stage 3



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# Right Actions. At the Right Time.



### Stage 1

- You Need to Get **Organized**
- Central place, everyone using it
- If you do this well, you grow again, and...

### Stage 2

- Your Need Team **Mgmt and ClientX**
- 3 mgmt questions and delightful clientX
- If you do this well, you grow again, and...

### Stage 3

- You need to Build **Leaders** in your firm
- Accountability for managers
- If you do this well, you grow again, and...

# Where Is Your Firm?

I Need to Get  
**Organized!**



I Need to  
**Scale!**



I Need to  
**Lead!**



Can You  
Imagine if  
Software  
*Aligned*  
with *Your*  
*Goals?*

I Need to Get  
**Organized!**



I Need to  
**Scale!**



I Need to  
**Lead!**





# Future Platform



# Start of Workflow OS

## Organize

Foundational product that helps you get organized ... fast

## Scale

Designed to help you scale your firm through better team management and client delivery

## Lead

Designed to help you elevate leaders while maintaining quality

# Our Product Tiers

## Organize

Foundational product that helps you get organized ... fast

## Scale Beta- TODAY

**First Feature in  
Scale Goes Live  
Today**

## Lead

Designed to help you elevate leaders while maintaining quality

# Our Product Tiers

## Organize

Foundational product that helps you get organized ... fast

## Scale

**Demo at  
2:00pm EST**

## Lead

Designed to help you elevate leaders while maintaining quality





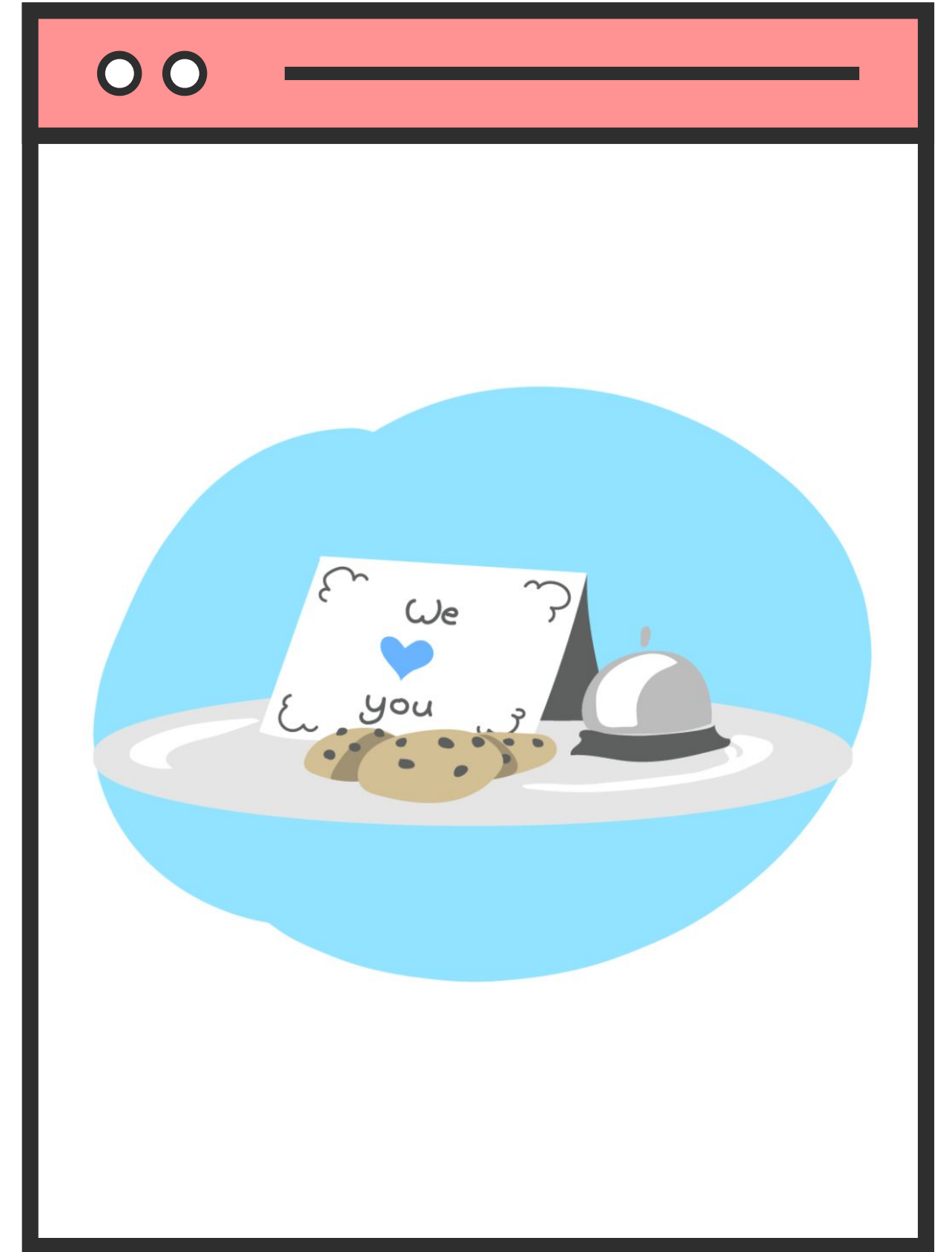
# Justin Burdett

Director of Product, Jetpack Workflow

- >3 years at Jetpack
- >10 years working at small software cos
- 2 kids under the age of 4

# Today's Agenda

- Data and trends we're seeing in 2020
- How you can help drive product updates





# We've seen a lot of growth

- Over 10,000 active users
- Over 2 million jobs completed in 2020
- Over 11 million tasks completed in 2020



# Jobs Done on Time

**# of jobs completed  
before due date**

---



**Jobs Done on  
Time %**

**# of jobs completed**

**Are we helping our  
customers improve  
JDoT?**

# December 2019

- First 3 months: 45.87% JDoT
- Last 3 months: 58.33% JDoT (+12.46%)



# January 2020

- First 3 months: 48.49% JDoT
- Last 3 months: 60.60% JDoT (+12.11%)

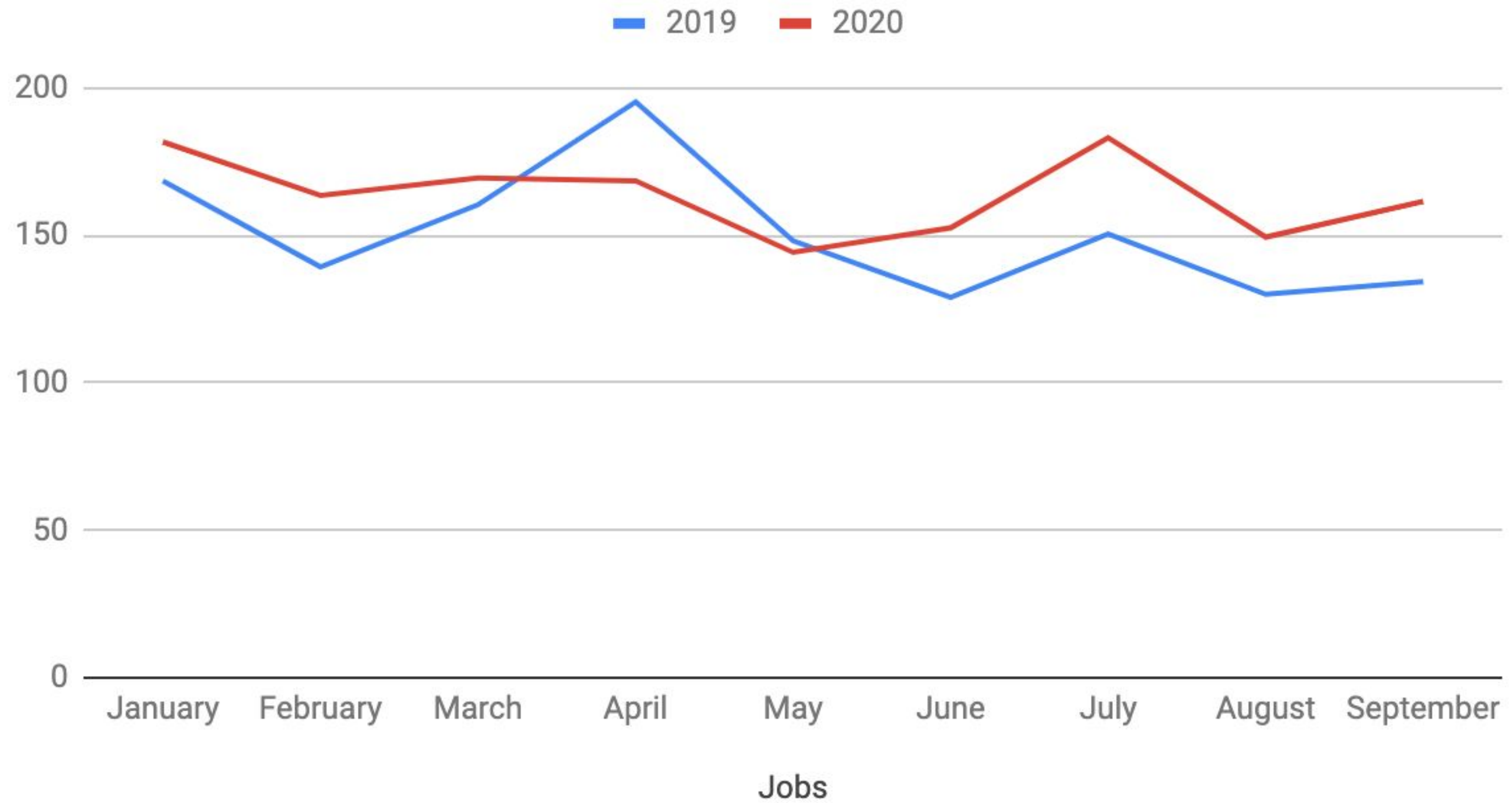
# February 2020

- First 3 months: 56.83% JDoT
- Last 3 months: 66.56% JDoT (+9.73%)

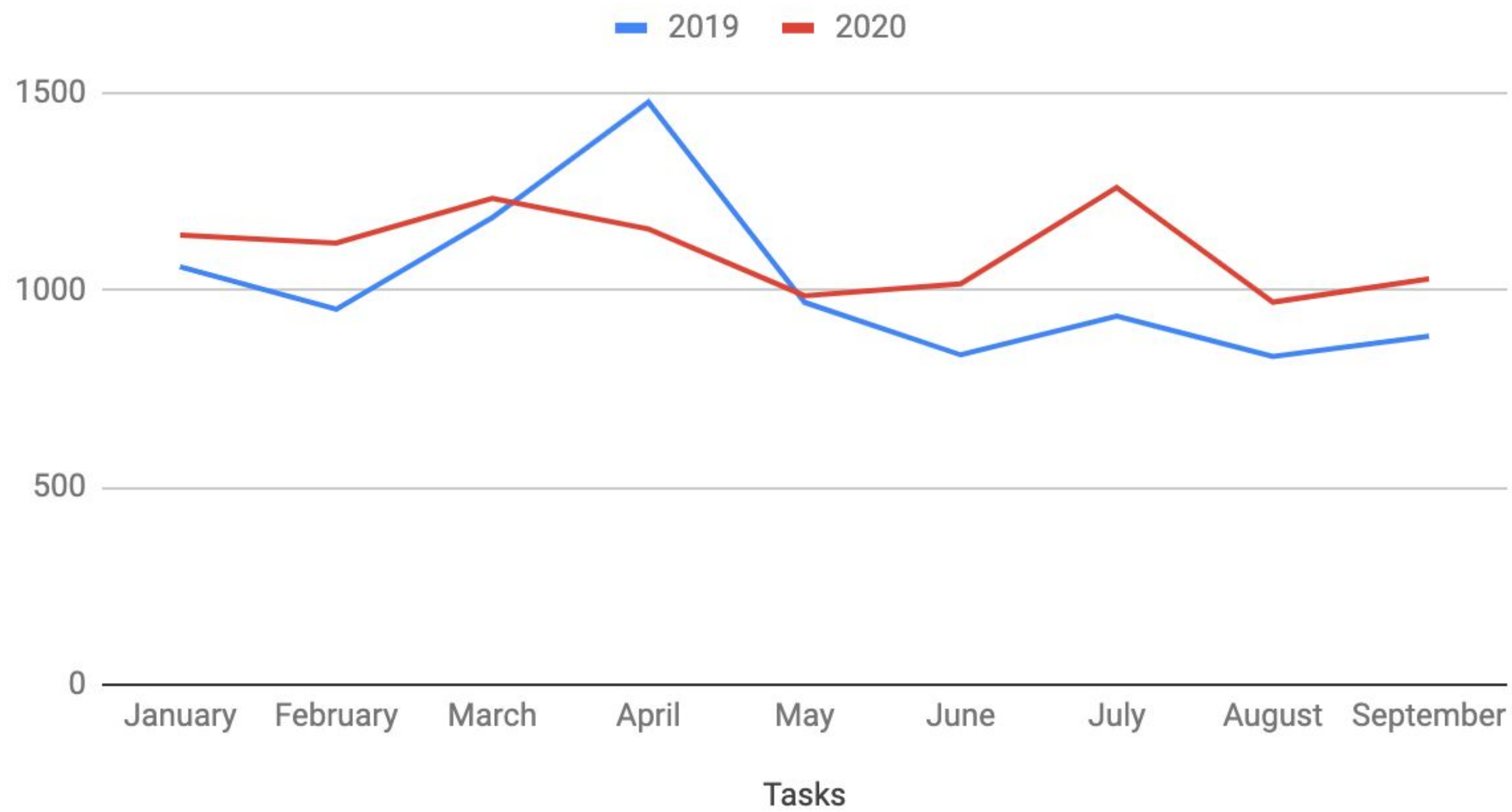
# 2019 vs. 2020

<b>Jobs</b>	<b>2019</b>	<b>2020</b>	<b>Difference</b>		<b>Tasks</b>	<b>2019</b>	<b>2020</b>	<b>Difference</b>
January	168	182	13		January	1059	1139	80
February	139	164	24		February	951	1119	168
March	160	169	9		March	1183	1232	49
April	195	168	-27		April	1476	1154	-322
May	148	144	-4		May	968	986	17
June	129	152	24		June	836	1016	180
July	151	183	33		July	934	1260	326
August	130	149	19		August	832	969	137
September	134	161	27		September	883	1028	145

## Jobs completed by month



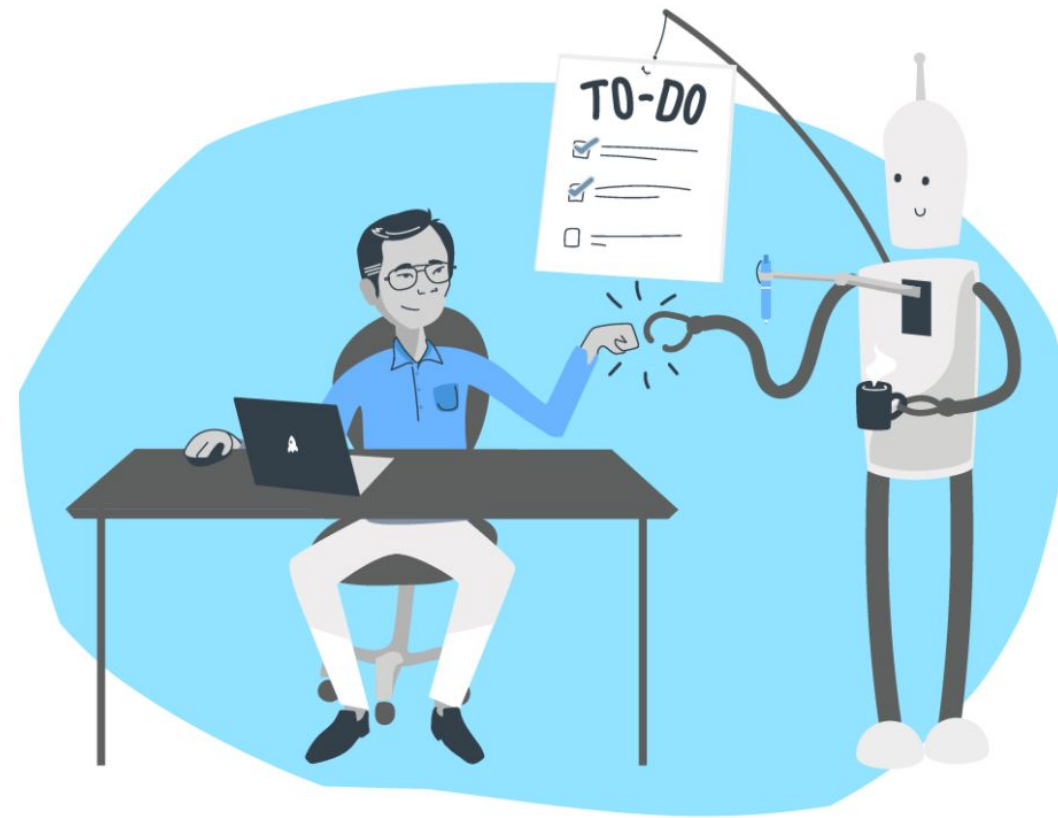
## Tasks completed by month



**Looking at data is just  
one way we make  
decisions**



# Ways you can help



- Give your feedback, ideas, problems or challenges to us!
- Participate in email on in-app surveys or calls as needed
- Join the customer council!

# Join The Customer Council

**[jetpackworkflow.com/council](https://jetpackworkflow.com/council)**

# Thank you!



# Automation Alley





# Heather Satterly

Founder of Satterley Training & Consulting LLC

- Top 5 Accounting Firm Experience
- Top 100 ProAdvisor
- Podcaster at Appy Hour







# Ryan Embree

Partnerships @ Practice Ignition

- Worked in all 4, international PI offices
- [practiceignition.com](https://practiceignition.com)
- Golfer and Skier



*Welcome!*

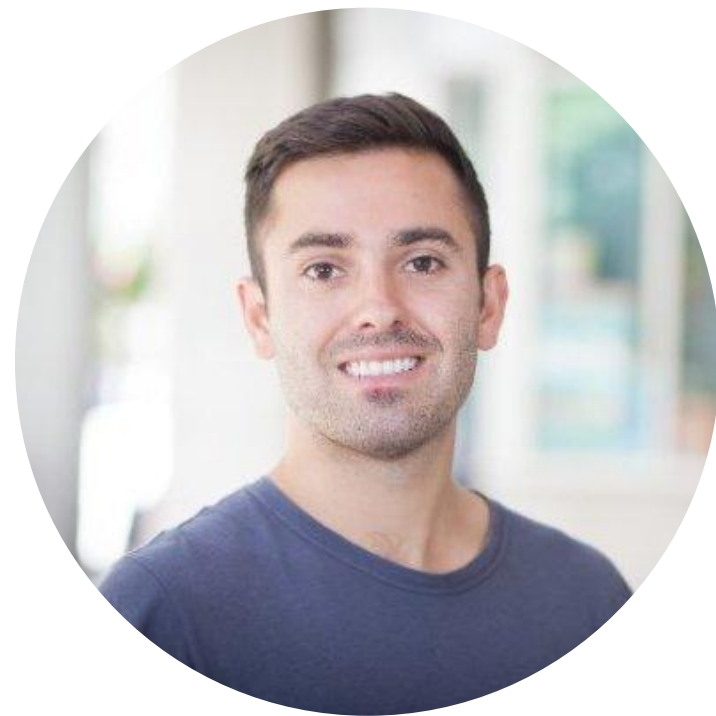


**PRACTICE Ignition**

[practiceignition.com](https://practiceignition.com)



@ignitionapp



**Ryan Embree**

Partnerships




@ignition\_Ryan



# Proposal to paid in one place

- ✓ No more print, sign scan and sending of your proposal and engagement letter.
- ✓ Create and close more deals in under 5 minutes with Practice Ignition.
- ✓ That's more closed deals for you and less back and forth for everyone.



Growth Accounting  
30 November 2019 - 1 December 2019


1

Summary

Monthly Recurring	\$420.00
> Payroll	\$420.00
On Acceptance	\$150.00
> Professional Services	\$150.00

2

Payment Details\*

 Mastercard •••• 2345 05/20  
Tom Maxwell

3

Review, Sign and Accept

It is understood that any unpaid services that are outstanding at the date of termination are to be paid in full within 10 days from the date of termination.

Client Acceptance

To accept this agreed fee and the terms and conditions herein including the compilation agreement to prepare the Professional Services, please click on the Accept Proposal button and sign on screen, or you can download a pdf.

[View PDF](#)

T. Maxwell

Accept Proposal

# We are a team of accountants, innovators and developers.

We endeavour to shift the exchange between accountants and their clients from compliance number crunching to a relationship that truly adds value.





# What problem do we solve?

FIRM NAME  
Certified Public Accountants

DATE  
COMPANY NAME  
COMPANY ADDRESS 1  
COMPANY ADDRESS 2  
COMPANY CITY STATE ZIP

Dear CONTACT PERSON:

This will confirm our understanding of the arrangements for our audit of the financial statements of COMPANY NAME, for the year ending BALANCE SHEET DATE.

We will audit the Company's balance sheet as of BALANCE SHEET DATE, and the related statements of income, retained earnings, and especially cash flows for the year then ended, for the purpose of expressing an opinion on them. The financial statements are the responsibility of the Company management. Our responsibility is to express an opinion on the financial statements based on our audit.

We will conduct our audit in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit will provide a reasonable basis for our opinion.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected customers, creditors, legal counsel, and banks. At the conclusion of our audit, we will request certain written representations from you about the financial statements and matters related thereto.

Although the audit is designed to provide reasonable assurance of detecting errors and irregularities that are material to the financial statements, it is not designed and cannot be relied

## Accountant's process

Edit It



Print it



Sign it



Scan It



Send it

# What problem do we solve?

## Client's process

Print it



Sign it



Scan It



Send it

FIRM NAME  
Certified Public Accountants

DATE  
COMPANY NAME  
COMPANY ADDRESS 1  
COMPANY ADDRESS 2  
COMPANY CITY STATE ZIP

Dear CONTACT PERSON:

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We will audit the Company's balance sheet as of BALANCE SHEET DATE, and the related statements of income, retained earnings, and especially cash flows for the year then ended, for the purpose of expressing an opinion on them. The financial statements are the responsibility of the Company management. Our responsibility is to express an opinion on the financial statements based on our audit.

We will conduct our audit in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audit will provide a reasonable basis for our opinion.

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Although the audit is designed to provide reasonable assurance of detecting errors and irregularities that are material to the financial statements, it is not designed and cannot be relied

# How do you get paid?

**Direct debit request**  
The quick and convenient way to pay

- Your payments will be automatically taken from your cheque or savings account on the due date.
- Direct Debit can only be set up to take out payments monthly.

Please complete and return this form:  
Direct Debit Administration  
GPO BOX 940, Melbourne, VIC 3001  
1300 369 905

Please make sure you read the direct debit service agreement on the following page.

**Your details**

Account Number

Full Name

**Payment option**

My preferred method of payment each month is (Please tick one box only):

☐ Minimum monthly payment, plus any overdue and over limit amount.

☐ Fixed amount of  (Minimum amount of \$10)

☐ Off Minimum monthly payment, plus any overdue and over limit amount (whichever is greater)

☐ Full closing balance payment as shown on my account statement

**Details of account to be debited**

We request GE Capital Finance Australia Pty Ltd (ABN 42 008 583 588) to debit the account described above with the amount of the payment due on my account as specified in the payment option schedule above.

Name of Financial Institution

Branch Name

Name of account to be debited

(We can only accept bank account details that are in the sole name of the account holder or from a joint bank account includes the name of the account holder.)

BSB number  Account number

**Your authorisation**

We acknowledge that this direct debit arrangement is governed by the terms of the direct debit request service agreement overleaf. If the nominated bank account is a joint account, both account holders signatures are required.

Account holder	Joint account holder (If nominated bank account is a joint account)
Name <input type="text"/>	<input type="text"/>
Signature <input checked="" type="checkbox"/> <input type="text"/>	<input checked="" type="checkbox"/> <input type="text"/>
Date <input type="text"/>	<input type="text"/>

## Client's process

Print it



Sign it



Scan It



Send it




# How do you keep track of all your engagements?

	1	2	3	4	5	
1	Name [de]	Wissenschaftlicher Name	Wuchshöhe [cm]	Blattrand	Wuchsform	Stängel
2	Kopf-Zwergginster	Chamaecytisus supin	30-80	ganzrandig [[File:Blat	Kleinstrauch	verholzt
3	Rauhaar-Zwergginster	Chamaecytisus hirsutu	15-50	ganzrandig	Kleinstrauch	verholzt
4	Schwarzwerdender Ge	Cytisus nigricans	30-100	ganzrandig	Kleinstrauch	gerillt, b
5	Gewöhnlicher Besengi	Cytisus scoparius	-200	ganzrandig	Strauch	kantig, s
6	Kugel-Ginster	Genista radiata	30-80	ganzrandig	Strauch	anlieger
7	Sichel-Luzerne	Medicago falcata	20-60	vorne gezähnt	aufsteigend-niederlieg	kantig, s
8	Hopfenklee	Medicago lupulina	10-30	vorne gezähnt	aufsteigend-niederlieg	kantig, s
9	Zwerg-Schneckenklee	Medicago minima	5-30	vorne gezähnt	aufsteigend-niederlieg	dicht an
10	Montpellier-Bockshor	Medicago monspeliac	5-20	spitz gezähnt	niederliegend, einjähri	kurz bel
11	Saat-Luzerne	Medicago sativa	30-90	vorne gezähnt	aufsteigend-niederlieg	kantig, s
12	Weißer Steinklee	Melilotus albus	30-150	± deutlich gezähnt	autrecht, einjährig	± kurz k
13	Hoher Steinklee	Melilotus altissimus	30-120	± scharf gezähnt	aufrecht, einjährig	meist ka
14	Kleinblütiger Steinklee	Melilotus indicus	15-50	± stumpf gezähnt	aufsteigend-niederlieg	± kahl
15	Echter Steinklee	Melilotus officinalis	30-120	gezähnt [[File:Blattra	aufrecht, einjährig	kahl
16	Gefurchter Steinklee	Melilotus sulcatus	10-50	gezähnt	aufrecht, einjährig	± kahl
17	Gelbe Hauhechel	Ononis natrix	20-40	gezähnt	aufrecht, mehrjährig	rund, dr
18	Zwerg-Hauhechel	Ononis pusilla	10-30	gezähnt	aufrecht, mehrjährig	aufrech
19	Kriechende Hauhechel	Ononis repens	30-60	gezähnt	aufsteigend-niederlieg	grün, all
20	Rundblatt-Hauhechel	Ononis rotundifolia	15-40	gezähnt	aufrecht, mehrjährig	drüsig b
21	Dornige Hauhechel	Ononis spinosa s.l.	30-60	gezähnt	aufrecht, mehrjährig	rötlich,
22						
23	Title	Schlüssel zu dreiblättrigen Fabaceen (Testdatensatz)				
24	Creators	Die Autorin				
25	Language	de				
26	Sources					
27	Copyright	© A. Autorin				
28	License	Creative Commons by-sa 3.0				



# Turn your proposal into a powerful sales tool

Embed a stunning PDF brochure that includes testimonials and results, your process, a visual project road map... anything that makes choosing you easy. And yes, we have stunning templates you can customize with a designer.



Grow your business with the market leaders in accounting for rapid growth startups.

Norman

Growth Accounting

Starting on 1 July 2018

Your Service Summary

Bookkeeping Monthly - Gold Package

With a monthly Bookkeeping Basic Package from Skyrise Accounting, you'll enjoy the benefits of:

- Online accounting software
- Processing bank and credit card business transactions
- Processing invoices on behalf of the business to clients
- Processing invoices from suppliers and advice you when they fall due for payment
- Reconciling bank and other selected accounts monthly
- Liaise with your accountant to ensure on time lodgement of your BAS reports

Advisory services - Quarterly Advisory Board & Virtual CFO Services (AU)

The CFO advisory services are an hybrid between CFO and Controller advisory services, to assist you in standard compliance & business strategic planning.  
This includes:

- Oversee your accounting systems to ensure proper bookkeeping and reporting
- Monitor the financial health and well-being of the business
- Budgets and forecasts to help measure business performance
- Help managing and forecasting cashflow assumptions and needs
- Guidance in strategic planning relating to growth and expansion
- Financial insight and guidance on all company decisions and issues

Accounting services - Sole Trader / Partnership Annual Accounting Services & Tax Return (Sole Trader, Partnership, or up to X amount) (Monthly) (AU)

Preparation of Annual financial accounts & annual tax return, based on the information being entered and reconciled in an accounting software package.  
This includes:

- Annual GST Reconciliation
- Preparation of annual tax return

1

2

3

4

SummarySchedulePaymentSign

Next >



# Accept payments on your proposals, upfront

Stop chasing clients for  
payments and bill via  
**credit card** or **direct debit**  
on your proposals.

Bank Account

Credit Card

1234 5678 9012 3456

05 / 2018

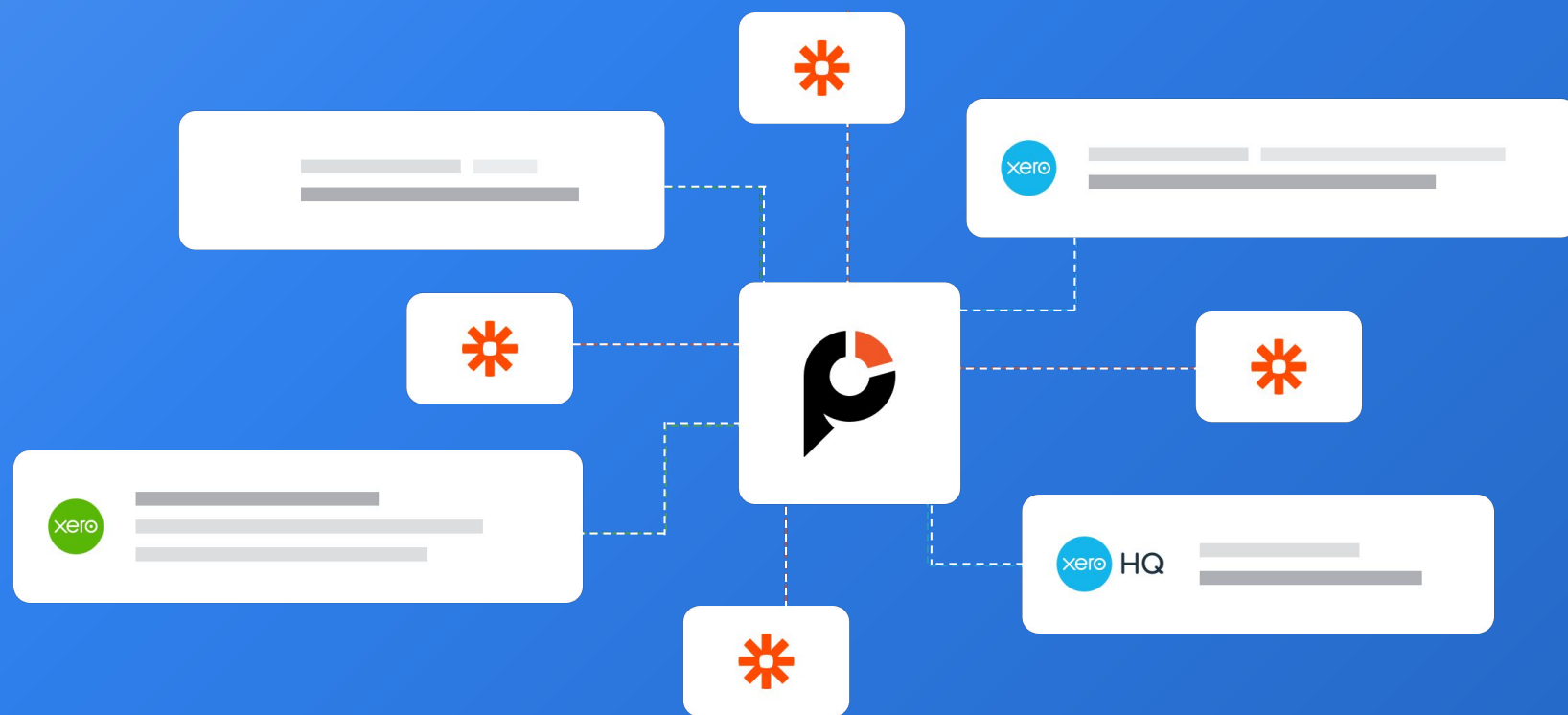
150

Pay Now

# Collect e-signatures for faster acceptance

It's not 1999 anymore, stop forcing your clients to print, sign and scan your proposals and contracts.

The screenshot shows a digital signature interface. At the top, there is a scrollable text area containing the following text: "It is understood that any unpaid services that are outstanding at the date of termination are to be paid in full within 10 days from the date of termination." Below this, the section is titled "Client Acceptance". Under the title, it says: "To accept this agreed fee and the terms and conditions herein including the compilation agreement to prepare the Professional Services, please click on the Accept Proposal button and sign on screen; or you can download a pdf." To the right of this text is a green link that says "View PDF". Below the text is a signature line with the handwritten name "T. Maxwell" and a pen icon to its right. At the bottom of the interface is a large green button with the text "Accept Proposal".



## Integrates with:

- ✓ Xero
- ✓ QuickBooks Online
- ✓ Zapier (1000+ apps)
- ✓ Xero Practice Manager
- ✓ Xero HQ
- ✓ Your Website (pricing calculator)
- ✓ ReceiptBank (Via Zapier)
- ✓ Jetpack Workflow (via Zapier)



### Add new Practice Ignition service agreement acceptances as Jetpack Workflow jobs

Practice Ignition + Formatter by Zapier + Jetpack Workflow

[Learn more](#)



### Find and update Jetpack Workflow clients for new accepted Practice Ignition proposals

Practice Ignition + Formatter by Zapier + Jetpack Workflow

[Learn more](#)



### Create Jetpack Workflow clients when Practice Ignition proposals are signed

Practice Ignition + Formatter by Zapier + Jetpack Workflow

[Learn more](#)



### Add new Practice Ignition proposals as Jetpack Workflow jobs

Practice Ignition + Formatter by Zapier + Jetpack Workflow

[Learn more](#)





# Gabe Caldwell

Director of Partnerships at Formstack

- Lived in 7 countries
- 15! nieces and nephews
- Built and sold 2 businesses
- Formstack.com







#### Combine Files

Combine multiple files into a single PDF or DOCX.



#### Create Data Route Merge

Send data to your Data Route URL.



#### Extract Field Values From PDF

Extracts the field values from the given PDF file.



#### Create Client

Creates a new Client



#### Find Client

Finds a Client.



#### Convert File to PDF

Converts a given file to a PDF.



#### Create Document Merge

Send data to your Merge URL.



#### Create Job

Creates a Job with the details specified. You can create a Job from a selected Jetpack Workflow Template and assign it to a specific Client.



#### Update Client

Updates a Client



#### Find or Create Client

Finds a Client





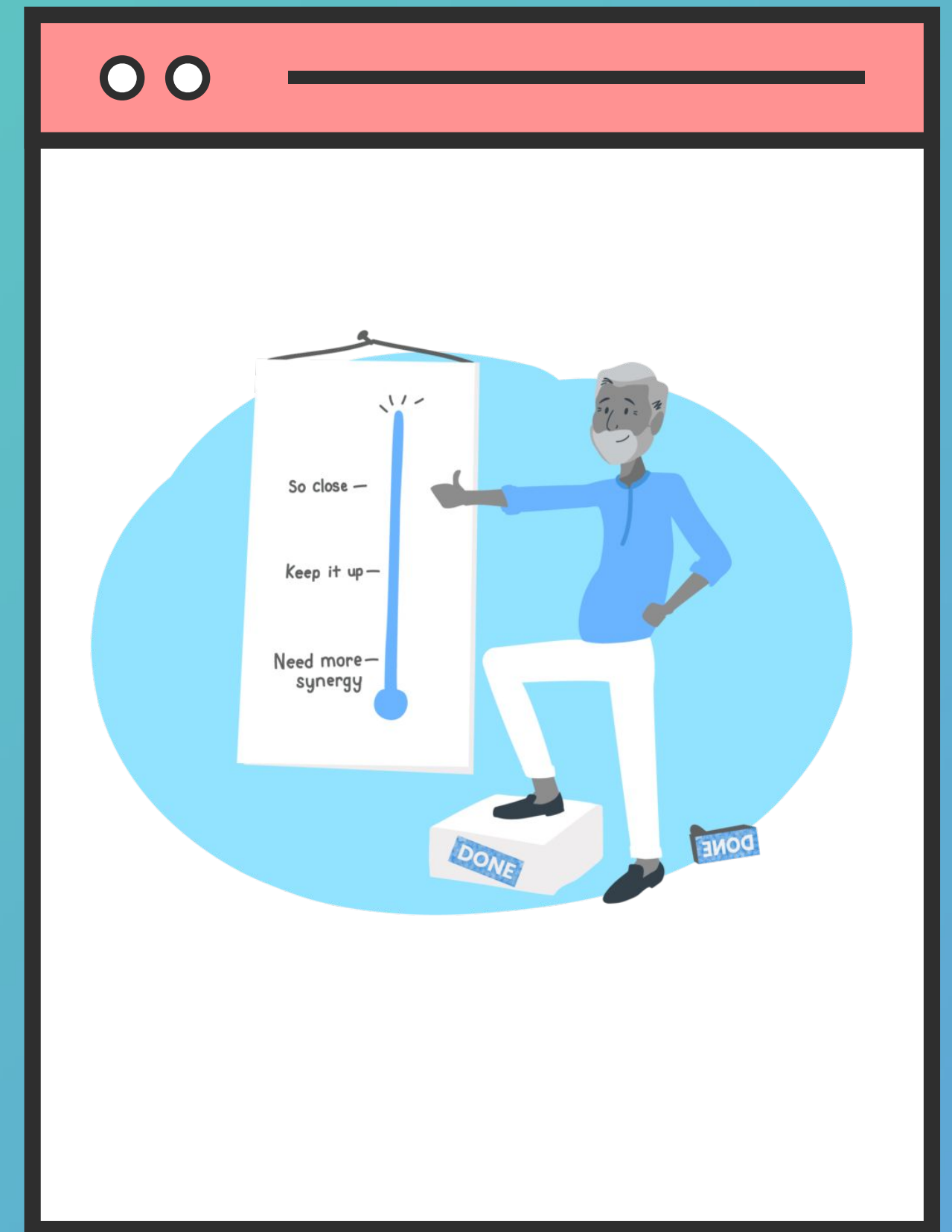
# Becki Gallagher

Customer Success Specialist,  
Jetpack Workflow

- Resident Zap-Queen
- Plays pinball all-the-time
- [becki@jetpackworkflow.com](mailto:becki@jetpackworkflow.com)
- Team Trainings are the best!

# 2 free and easy zaps to help manage new client onboarding

- Adding a new client into Jetpack will automatically create a job of your choosing
- A completed google form will create a new client in your Jetpack account





# Thank You!

Please visit:

[jetpackworkflow.com/zapier-survey](https://jetpackworkflow.com/zapier-survey)

to give us your feedback and to sign up for the first look at our Zapier Certification Course!



# Customer Panel

[60 second responses only]





Ruben Cruz  
CEO, Crulliance



Jody Gruden  
CEO, SummitCPA



Amanda Evans  
Tightship Bookkeeping

# question 1

**How do you know when it is time to let someone go?**

## question 2

**How do you train/coach the team to do things “your way”?**

## question 3

**What format do you use for 1:1 or individual check-ins?**

# question 4

**How do you know when it's time to promote someone?**



# question 5

Ways to find/determine if someone is the “right” fit before hiring?



# Donny Shimamoto

Managing Director  
Intraprise TechKnowlogies

- Founder of Intraprise TechKnowlogies
- Prolific tech speaker (AiCPA, etc)



# First Feature in “Scale”

# Launching Today

## Organize

Foundational product that helps you get organized ... fast

## Scale Beta

Designed to help you scale your firm through better team management and client delivery

Today is about a new feature around helping you manage the upcoming work for your team



# Manage My Team: **Losing Control**

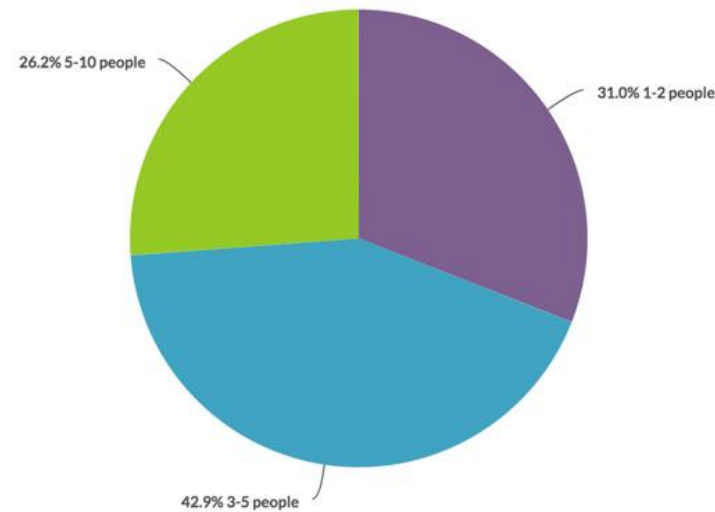
The average person uses **13 different methods to control and manage their time.**

A manager on average spends **3 hours each day on interruptions.**

On an **average day, there are 17 million meetings in America** (as much as 30% are “unnecessary”).

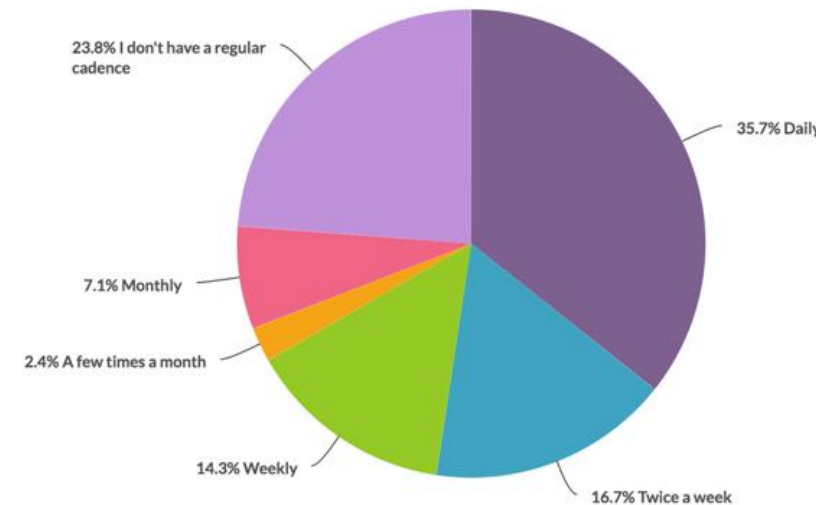
# Manage My Team Survey: Insights

2. How many people report to you?



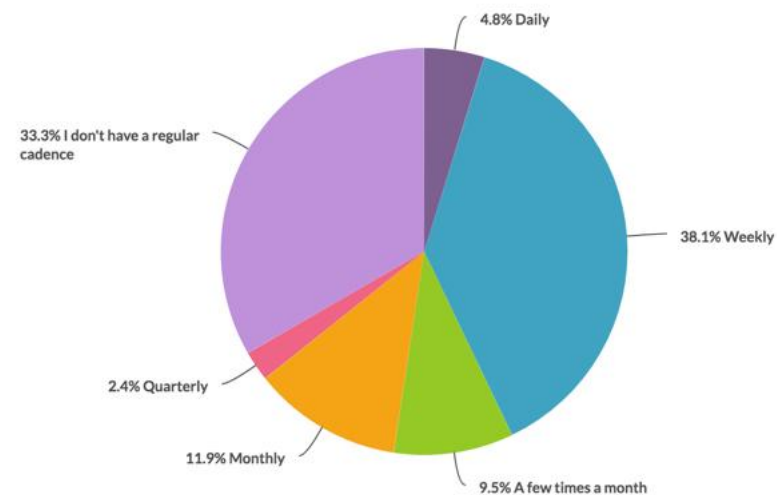
Average Manager has 3-5 Direct Reports

11. How often do you monitor progress for your team?



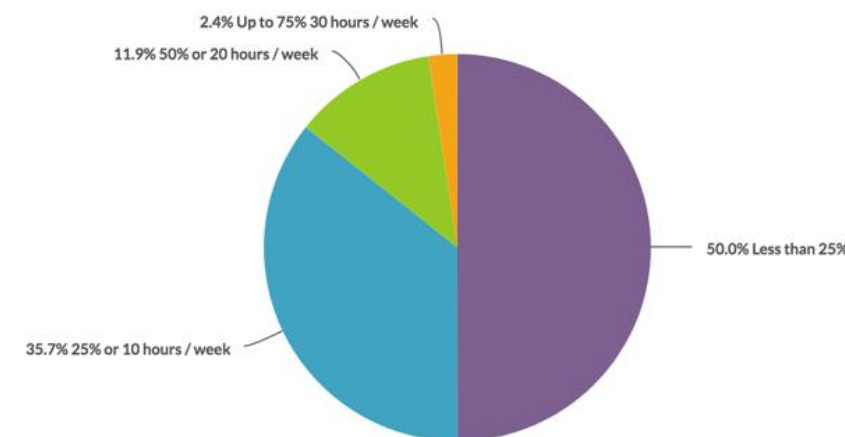
35% of Firm Managers Check Progress Daily

15. How often do you plan or schedule your team?



33% of Managers Don't Have a Set Planning Cadence

6. What percentage of your working hours per week do you spend in "management" (meetings, 1-1's, huddles, reviewing metrics or reports, etc.)



50% of Firm Managers Spend 10+ Hours/week managing

# Manage My Team: **The Critical 3**

## What's Due?

Jobs List  
MyWork  
Progress Report  
Labels & @Notes

## What's Done?

Archive View  
Dashboard  
Job Profile  
Task List

## What's Upcoming?

Metric Report?  
Calendar?

# Manage My Team: **ROI Driven**

**“ We moved from spending 35% of our time on admin/non billable client work to only spending 15% of our time (across the entire team!). ”**



**Gianna Nguyen**

Manager- Accounting & Operational Advisory



**Andrew Nguyen**

Owner, Nguyen & Company, CPA



# DEMO

# Where are we now?

## Organize

Foundational product that helps you get organized ... fast

- Unlimited Jobs, Templates, Clients
- Zapier integration
- Reporting
- Team collaboration
- 30 minute response time

## Scale

Better manage your team and deliver a scalable client experience

- **Launches Today**
- **First Feature is Plan**
- **Offer for Customers**

## Lead

Designed to help you elevate leaders while maintaining quality

# Today

## Organize

Foundational product that helps you get organized ... fast

**\$45 month to month**  
**\$36 / month (yearly)**

## Scale Beta

Better manage your team and deliver a scalable client experience

**\$60 month to month**  
**\$50 / month (yearly)**

# Customers Only

## Scale

Better manage your team  
and deliver a scalable  
client experience.

\$60 month to month  
\$50 / month (yearly)

**How do we celebrate  
our customers?**

**Introductory Offer?  
Imagine if...**

- 15%
- 25%
- 50%



# Customers Only

## Up to 80% Off

# Customers Only

## Scale Monthly

~~\$15/month increase~~

**Customers Only:**  
**\$5/month per user**  
*65% Off*

## Scale Yearly

~~\$168/year increase~~

**Customers Only:**  
**\$36/year per user**  
*80% Off*

# FAQ

**How long is the offer open?**

› Dec 31st, 2020

**What's the Future of "Scale"?**

› We'll be adding premium features to scale in 2021

**What if I don't use "Scale"?**

› 365 Day Refund Period for Scale Upgrade

**What if I'm not a current customer?**

› You can access Scale Beta until Dec 31st, 2020

### Scale Monthly

~~\$15/month increase~~

**Customers Only:**  
**\$5/month per user**  
*65% Off*

### Scale Yearly

~~\$168/year increase~~

**Customers Only:**  
**\$36/year per user**  
*80% Off*

**365 Day Discount & Refund Period.**  
**Offer Expires Dec 31st, 2020.**  
**More Features Coming in 2021.**

**[jetpackworkflow.com/beta](https://jetpackworkflow.com/beta)**







# Customer Award Ceremony



JDoT winners, biggest ROI, extra mile and more!

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**Jetpack Workflow has  
one of the biggest,  
brightest technology  
driven accountants in  
the world**



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# Let's Celebrate Them



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**Have a story to share?**  
**[David@jetpackworkflow.com](mailto:David@jetpackworkflow.com)**

**2021 is right around the  
corner ;)**



# Return on Investment Award



# Summit CPA

Increased Profits by  
**\$280,000**

● Jody Gruden

● Jamie Nau

● Adam Hale



# Extra Mile Award

# Frank Rimerman

**Trained 100+ accounting  
professionals**

● Clarissa Dench

**Frank, Rimerman + Co. LLP**

certified public accountants

# JDoT Award (Top 3)

## Financial Navigation Group LLC

- JDoT score of...
- **90.9% JDoT!**
- Emily Zellner



## Midnight Bookkeeping

- JDoT score of...
- **94.62% JDoT!**
- Jacqui Posey



## Furgison & Co

- JDoT score of...
- **92.59% JDoT!**
- Becky Furgison





# Frontier Award

## Apex Payroll

- Rob Olson



## LexTax

- Doug Waite



## JB Brown & Co

- Jeffrey Brown



## EdgeAdvisors

- Marshall Watry



## New Mexico CFO

- Jamey Shelton



## Customized Computer Accounting

- Michael Chaffee



# Thank YOU



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