



Leading through change: An outsourced journey to drive business forward

Ashleigh Sutter



CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

Today's speaker



Ashleigh Sutter
Director and Practice Leader
[@SwissBliss1](#)

Our backgrounds



International auditing and tax
from 2008 - 2011

Joined Elliott Davis Audit in 2011

Transferred to Elliott Davis CAS
practice in 2015

Practice Director - 2017

Agenda

Our backgrounds

Elliott Davis' story

Leadership considerations

Always getting better

What will you do?

Elliott Davis' story

Vision: To make a positive impact on our customers, people, and communities.



People

Predominantly hourly employees

35 employees

6 offices

8-12 hours/year of training

No leverage

Elliott Davis' story

Mission: To make a positive impact on our customers, people, and communities.



Customers

Compliance customers

Box of receipts

Looking to tax for consulting

Low average realization

Applying pressure



People

Title/role changes

Pay equity

One Firm

Specialization

Training

Customers

Customer profiles

Realization

Net revenue

Average engagement

Vision



Leadership considerations

Communication

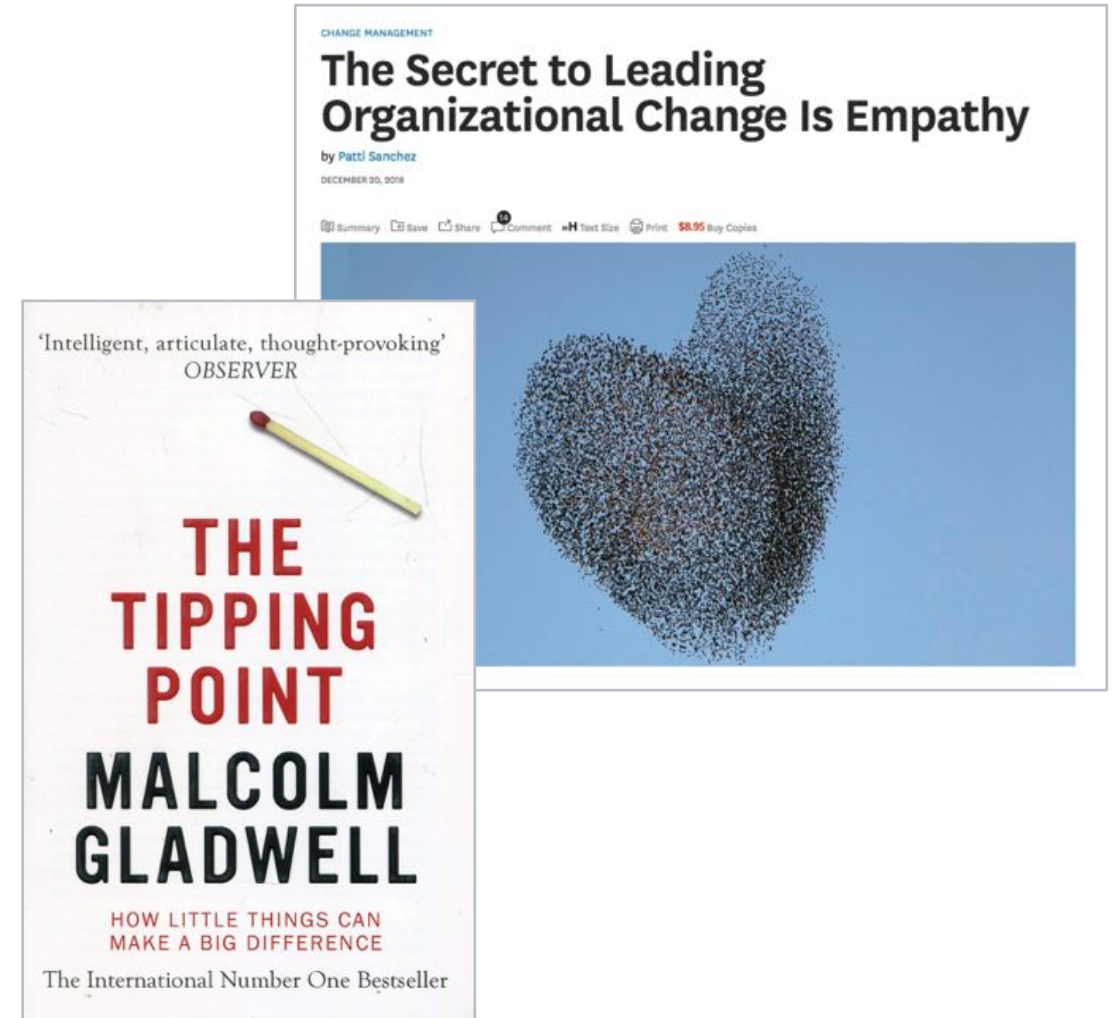
- Empathy
- Execution

Champions

- Sneezers
- Doers

Accountability

Strategy



Always getting better

Mission: To make a positive impact on our customers, people, and communities.



Cloud technology

Employee engagement

Ideal customer profile

One firm

Standardization

Box of receipts

Identifying value



**What is your first step
toward driving your
business forward?**

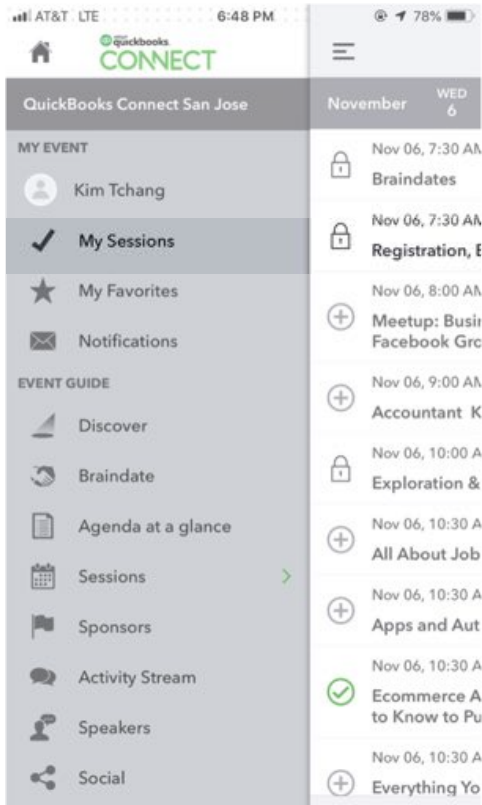


Questions?

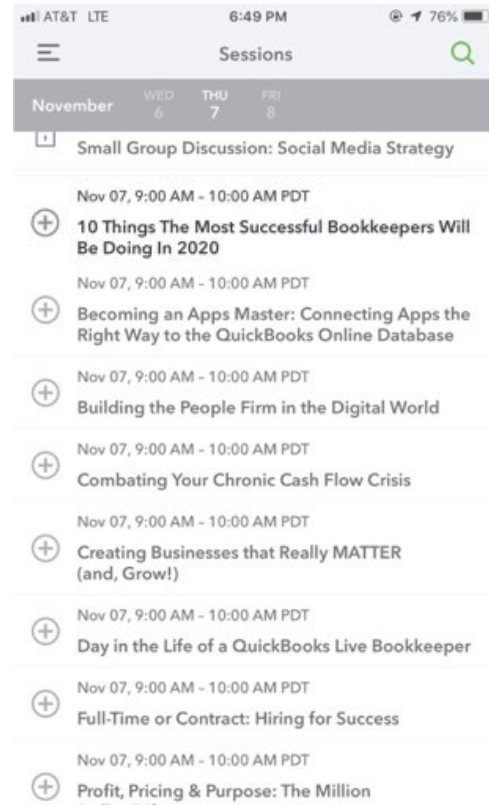
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

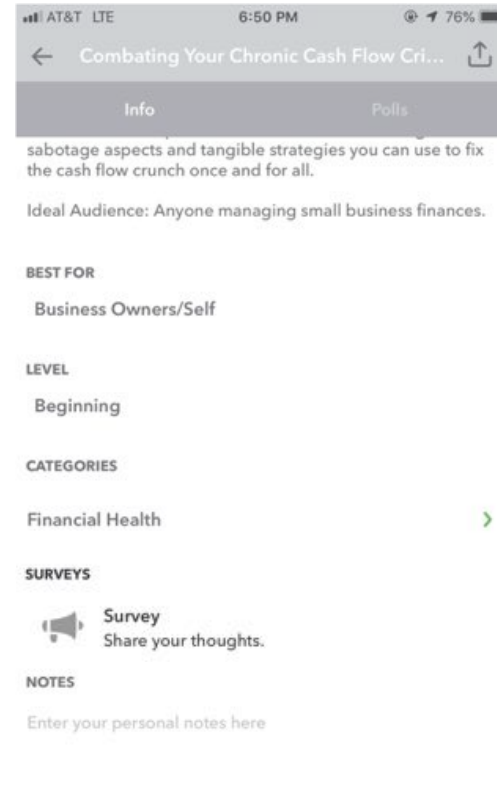
1. Select Sessions



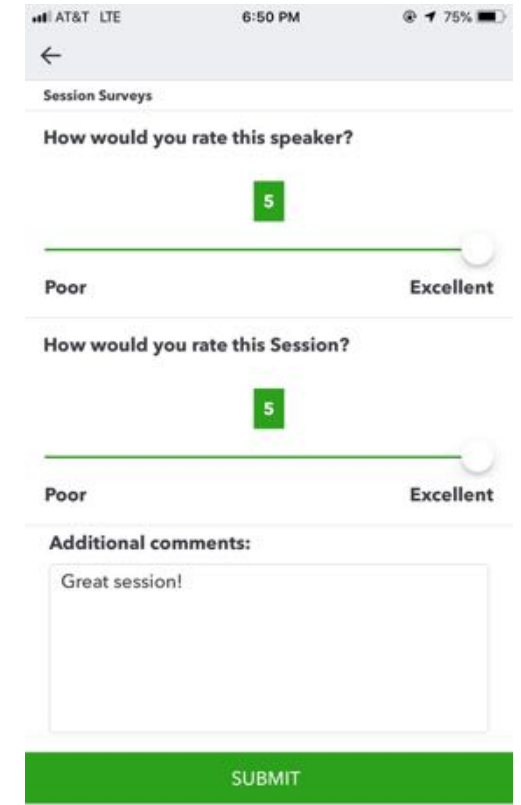
2. Select Session Title



3. Select Survey



4. Add Ratings



Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks CONNECT agenda page for November 7, 2023. The page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (the active date), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. An 'Expand all +' button is located to the right of the filters. The agenda items are listed in a table with columns for time slots and session titles. The items include: '7:30-9:00 am: Registration, Breakfast & Exploration'; '7:30-10:30 am: Braindates' (with a description and 'Learn more' link); '8:00-8:30 am: Yoga'; and '8:00-8:45 am: Breakout Sessions' (with a list of four sessions: 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm').

 **CONNECT**

OWN
THE
FUTURE
FUTURE