

LBMCMC

TECHNOLOGY
SOLUTIONS

Helping clients across North America solve
complex business problems with the right
technology solutions.

We don't just make IT better, we make IT right.

L B M C T E C H N O L O G Y S O L U T I O N S

**WELCOME TO THE LBMC
TECH COMMUNITY!**



The logo for LBMC Technology Solutions, featuring the letters 'LBMC' in a white, sans-serif font on a red rectangular background.The text 'TECHNOLOGY SOLUTIONS' in a white, sans-serif font on a black rectangular background.

A MESSAGE FROM OUR PRESIDENT AND CEO

BRYAN WILTON

We would like to thank you for selecting LBMC Technology Solutions as your technology partner. We appreciate your business and your trust in our organization. LBMC Tech is excited to add you to our growing client base, and we look forward to showing you the tremendous benefits of partnering with us. We pride ourselves on exceptional service and believe in going the extra mile.

At LBMC Tech, our mission is to dramatically improve lives through the use of technology and we aim to create lifelong relationships with our clients. LBMC Tech services 1000's of clients across North America. Again, we thank you for your partnership and look forward to a long, mutually beneficial relationship. Welcome to LBMC Tech!

Sincerely,

Bryan Wilton
President and CEO, LBMC Technology Solutions



THE LBMC FAMILY OF COMPANIES

LBMC is a [2023 Forbes Best Tax and Accounting Firm](#), one of the Southeast's largest accounting and business consulting firms, and an [Accounting Today Top 35 Firm in the Nation](#) serving approximately 11,000 clients with diverse needs across a spectrum of industries. Primary client groups include privately-owned middle market companies in the healthcare, manufacturing, technology, and private equity space.

LBMC has more than 900 team members, with offices in Nashville, Chattanooga, and Knoxville, Tennessee; Louisville, Kentucky; and Charlotte, North Carolina. A four-time national certified Great Place to Work, LBMC was also named 2023 Best Workplace in Consulting & Professional Services.



Founded in 1984 as a traditional accounting firm, today LBMC is an industry leader in:

ACCOUNTING
& FINANCE

HUMAN RESOURCES

TECHNOLOGY

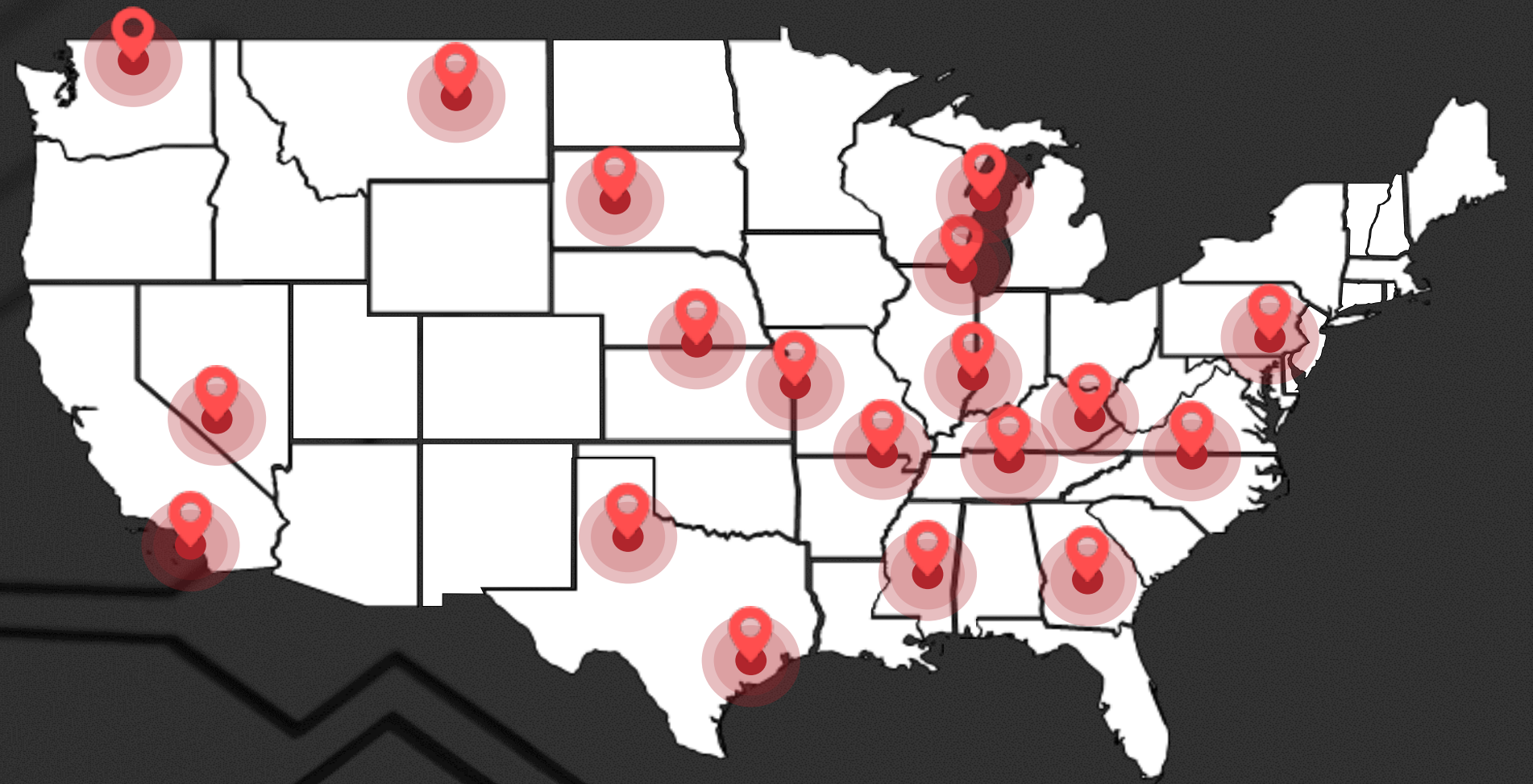
CYBERSECURITY

WEALTH ADVISORY

STAFFING

28 Years Providing Outstanding Business Technology Solutions

- 120 Team Members Across North America
- 1200+ clients in manufacturing, healthcare, financial services
- #32 Top Services Firm Nationally



LBMC

TECHNOLOGY
SOLUTIONS

LBMC Tech Suite of Services

LBMC

TECHNOLOGY
SOLUTIONS

**Hyper-agile
solutions for
growing
business.**



Cloud Computing, Managed IT Services and Network Security

Watchguard Rugged Wifi 6 and Mobile Device Management



Intelligent Automation and Low-Code Applications

OnBase and Workflow Management



ERP and Business Application Software

Microsoft Dynamics GP, Business Central and Sage Intacct
Microsoft O365



CRM and CXM Software

Microsoft Dynamics 365 and Salesforce



VOIP and Business Phones, Fax and
Unified Communications

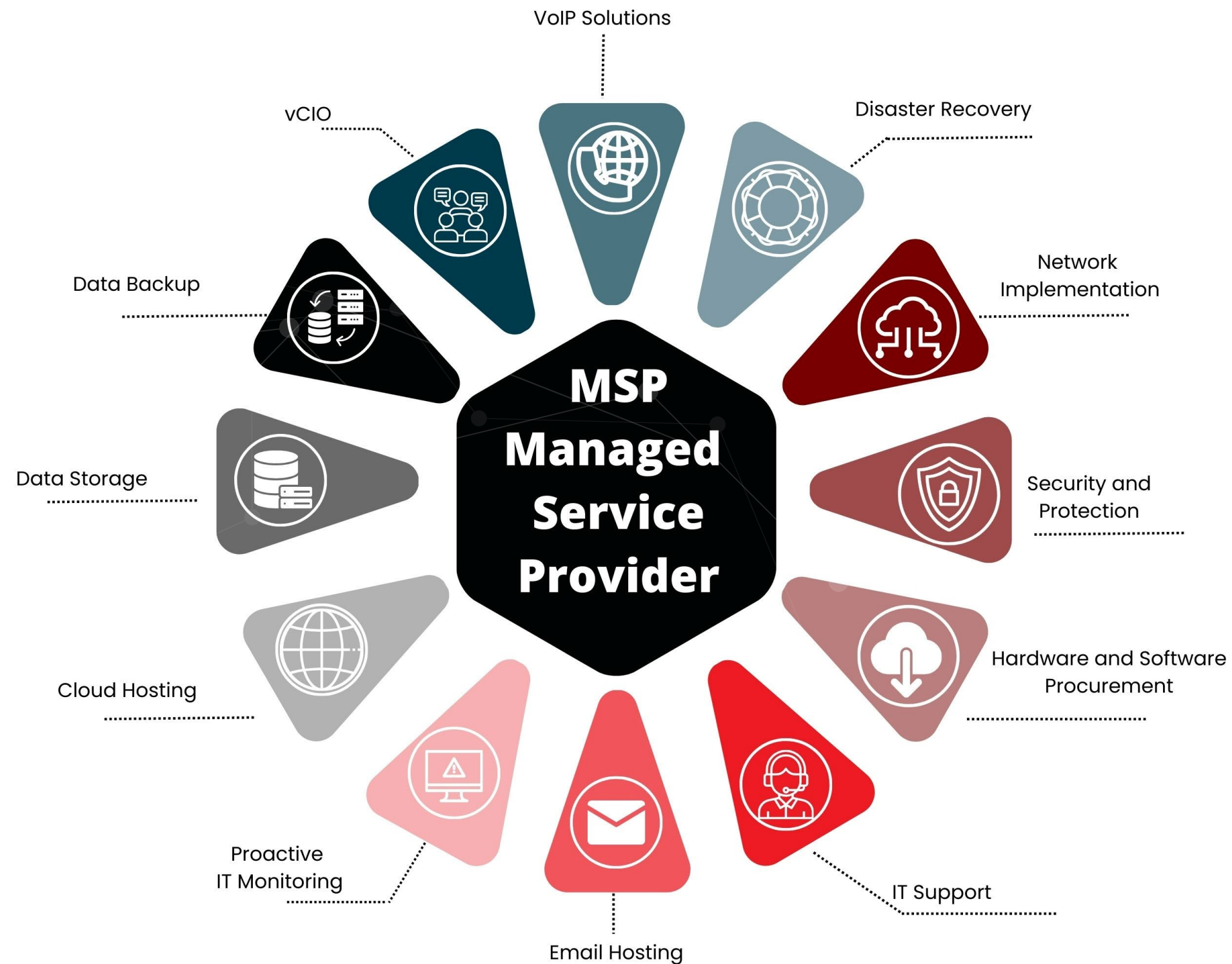


Custom App Development

ServiceTrade and SalesForce
Integrations

LBMC

Complete Managed IT Service Provider Solutions



USE THIS SLIDE AND THE NEXT COUPLE TO COPY/PASTE THE APPROPRIATE ACCOUNT TEAM



MEET THE TEAM



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Jason Barnes
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Our Implementation Methodology



STRATEGIC ALIGNMENT

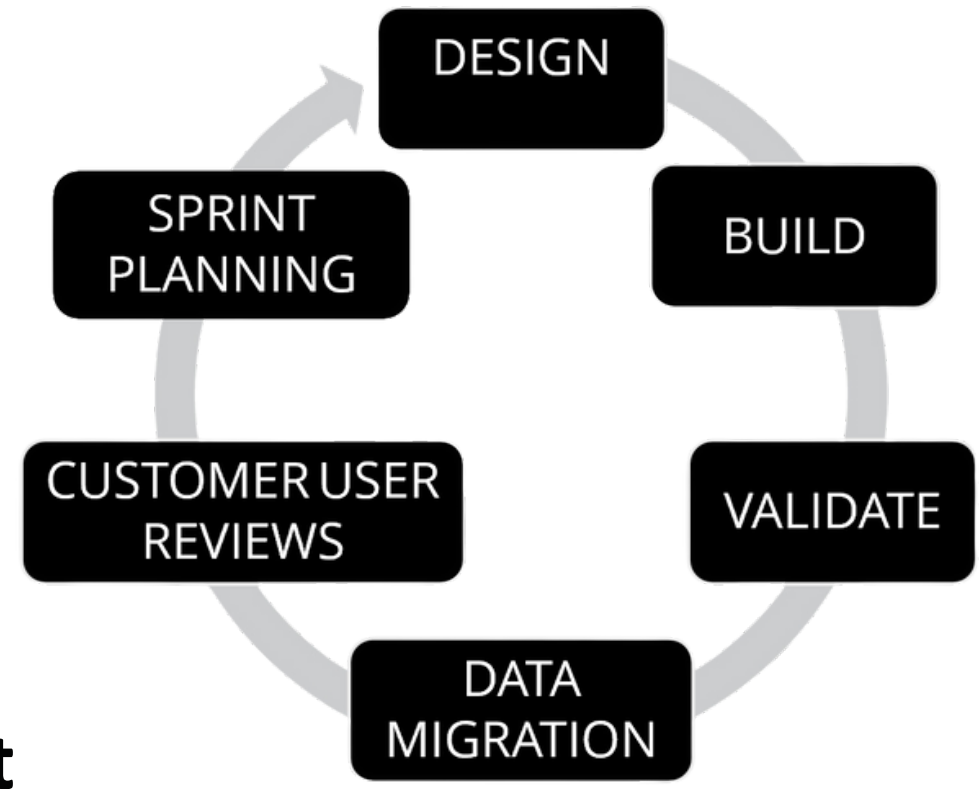
ORGANIZATIONAL CHANGE MANAGEMENT

CORE TEAM ONBOARDING

BUSINESS PROCESS REVIEW & GAP ANALYSIS



Incremental Development



Client Team Onboarding & Roles

Client Project Sponsor, [NAME]

- Senior executive leading the initiative
- Provide executive, business and organizational change management leadership
- Assist Client Project Manager with resolution of high impact decisions and issues

Client Project Manager, [NAME]

Serves as the main contact on the client side for all project matters

- Understands financial accounting principles; has experience in your business and transaction processing
- Enforce any agreed-upon procedural changes during the project
- Assign resources on the client side, track client-assigned tasks are completed on time
- Assist LBMC PM to manage budget and scope
- Lead, Track and update client process and decision action items
- Communicate key information to the Client Project Sponsor

Client Team Onboarding & Roles

Client Super Users, [NAME]

- Responsible for providing key business and configuration decisions and data validation to ensure proper set-up and data population of the system
- Data migration & validation
- Train-the-trainer, serve as internal knowledge resources, end user trainers
- Assist with design and configuration tasks for assigned functional area
- Participate in all training and testing tasks as assigned

Data Owner/s, [NAME]

- Data owners are responsible for extracting data from legacy system and population of templates for import into the new system.

Client *User Base*, [NAME]

- Any envisioned user of the new system. Should plan to attend relevant training classes. Involved mostly during Training and Testing phases; expected to be capable to perform jobs upon Go-Live.

LBMC Support Information



LBMC Technology Solutions is here to help with issues that may arise within your day-to-day activities. As a client of LBMC Tech, you have three ways of requesting support, which are listed in order of Best Practices:

- Log into the LBMC Online Service Desk to log a support issue: [Online Service Desk](#)
- Send us an email for support at techhelp@lbmc.com.
- Call us at 615-309-2487

When do you... log a support ticket, ask a question on the Community, or contact your Account Manager?

Log a Support Ticket: to investigate examples in question, investigate error messages, to clarify functionality, explain why something works the way it does, or perhaps ask why it worked yesterday but does not work today, confirm what you technically can and cannot do. Engage engineering if the system is not functioning as expected and outline options (but not recommendations) to address specific scenarios.

Get in touch with your Account Manager: When you want to get advice beyond the Support Desk, want to improve your processes, want to start utilizing a new module product, want to use a 3rd party integration, or want to do any type of customization of your current system. Your Account Manager will have product demo recordings to send you, product pricing, will set up a discovery call, and will lead you through the process of getting the results you need.

Upcoming Events

*Enter any upcoming events...i.e Webinars, Conferences, Client Lunch n Learn, UT Football tailgating in Knoxville, etc that would be applicable to this client...

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THANK YOU

www.LBMCTech.com