

◆ Client Accounting and Advisory Services ◆

Team of 3 Service Model

What is a Team of 3?

A Team of 3 is a collaborative approach, in which three individuals deliver high-value services with greater efficiency. This model ensures uninterrupted support to clients while promoting a healthy work-life balance for team members. By leveraging their complementary skills and designated responsibilities, the team maximizes productivity and client satisfaction. The Team of 3 model is a proven formula for delivering exceptional client accounting and advisory services while supporting a healthy workplace culture.



CLIENT CONTROLLER
THE PAST

CLIENT CONTROLLER

TOP RESPONSIBILITIES

- ◆ Tax Planning
- ◆ Tax Preparation
- ◆ Tax Projections
- ◆ Financial Optimization
- ◆ Compliance Oversight
- ◆ CSM Support

TOP GOALS

- ◆ Optimize income and expense presentation
- ◆ Present tax saving opportunities
- ◆ Monitor business compliance requirements for timely filing
- ◆ Create customized tax strategy aligned with the business's and owner's financial goals

DESIRED SKILLS

- ◆ Bachelor's degree in Accounting or Finance required
- ◆ CPA certification preferred
- ◆ 5+ years of experience in private/public accounting
- ◆ Income tax and project management experience
- ◆ Team leader who enjoys mentoring staff
- ◆ Strong technology skills

Have questions?

Our team at DBA developed the Team of 3 model in 2020. The Team of 3 structure has allowed us to add greater value to more clients while retaining and attracting team members. Email rachel@dillonadvisors.com to schedule a consultation for a deeper understanding of implementing and serving your clients with a Team of 3.



CLIENT SERVICE MANAGER
THE PRESENT

CLIENT SERVICE MANAGER

TOP RESPONSIBILITIES

- ◆ QuickBooks Online
- ◆ Payroll Administration
- ◆ Income Management
- ◆ Expense Categorization
- ◆ Receipt Capture
- ◆ Financial Statements

TOP GOALS

- ◆ Maintain financial data to foster confident business decisions
- ◆ Optimize expense and income categorization for tax savings
- ◆ Execute payroll to eliminate errors and penalties
- ◆ Prepare precise financial statements for owners, lenders, or potential buyers

DESIRED SKILLS

- ◆ Associates or Bachelor's degree in Accounting or Finance
- ◆ Prior experience (2 years) in private/public accounting
- ◆ Exhibits time management and organization skills
- ◆ Strong technology skills
- ◆ Ability to multi-task and work independently with minimal supervision

Why does the Team of 3 approach work?

The Team of 3 was designed to harness the diverse skills, expertise, and perspectives of each member. This approach creates a synergy that enhances problem-solving, decision-making, and overall productivity resulting in exceptional client service and team capacity. Aligning Teams of 3 with designated industries allows for even greater expertise and efficiencies in your firm.



CLIENT CFO
THE FUTURE

CLIENT CFO

TOP RESPONSIBILITIES

- ◆ Growth Strategy
- ◆ Cashflow Management
- ◆ Profit Maximization
- ◆ Succession Planning
- ◆ Accountability
- ◆ CSM and Controller Support

TOP GOALS

- ◆ Implement strategies for business goal achievement
- ◆ Increase business value for future events
- ◆ Minimize and constrain business expenses
- ◆ Optimize business processes, team members, services, and pricing

DESIRED SKILLS

- ◆ Bachelor's degree in Accounting or Finance required
- ◆ CPA certification required
- ◆ 5+ years of experience in private/public accounting
- ◆ Income tax and project management experience
- ◆ Team leader who enjoys mentoring staff
- ◆ Strong technology skills