CUSTOMER EXPERIENCE JOURNEY (Current)

LARGE CPA FIRMS

"I never know who to call. There are so many names and roles -- I just need one person to contact."

"The billing and rebilling is often inaccurate and confusing."

"We would like to receive one invoice instead of three"

"We frequently receive incorrect bills that do not correspond to the provisions of our contract, and we need to contact our rep to have them reissued"

CPA Partner

"I have trouble searching for the exact information I need, making the process time consuming. Search capability is inaccurate - google gives me better results."

"Need a better way to transfer content from the software into standalone documents -- without icons and formatting. Other software does this much better."

"Need onsite training provided as part of service at least once a year."

"Continuous emails regarding training can be frustrating."

"Training could be more focused on specific examples."

Accountant

"Very good training material. All trainers we interacted with are professional"

"Information is too basic -- we need more detail."

"I don't like getting invoices for renewals 90 days before the subscription ends."

"Too much paper involved in the renewal process -- could be streamlined."

Accounting Manager

Customer Sentiment

Consideration & Evaluation	Purchasing	Installation & Onboarding	Product Usage	Product Support	Renewal & Referral

% Satisfied [% 7-10 Rating]

Consideration & Evaluation	Purchasing	Installation & Onboarding	Product Usage	Product Support	Renewal & Referral
Sales: 70% Acct. Mgmt. 70%	Contracts: 55% Order Mgmt. 60% Billing: 60%	Training: 75%	Product: 85%	Prod./Tech. Support: 75% Cust. Supp. 75%	Renewal: 80%

Pain Points

ROLES
- Sales
- Order Mgmt.
- Training
- Support
- Acct. Mgmt.

Consideration & Evaluation	Purchasing	Installation & Onboarding	Product Usage	Product Support	Renewal & Referral
• Contact confusion • Sloppy post-sales transition	• Order Errors • Inaccurate Billing • User Admin	• Training not customized	• No alerts • Sloppy workflow • Slow search	• Support handoffs	• Poor renewal timing • Renewal billing errors

Overall

Satisfaction	80%
Likelihood to Recommend	85%
Likelihood to Continue Using	85%
ACV	$100k

GOLDRESEARCH INC.