

LetsDoSales — Positioning One-Pager

Niche: client document chasing for Canadian accounting & bookkeeping firms.

One-liner (use this everywhere): > We chase your clients' missing documents, so your preparers prepare returns.

The expanded version (website hero): > Your clients' documents arrive late, half-complete, or not at all — and the chasing > lands on your most expensive people. LetsDoSales runs the chase automatically: it knows > what each client still owes, asks them for the *specific* missing items, escalates to the > partner when they go quiet, and keeps a dated record of every touch.

Who we serve

- Canadian CPA and bookkeeping firms, 2-15 staff
- Roughly 100-500 active clients, with an owner-partner who still prepares returns
- First market: Calgary, Edmonton, Toronto — delivered remotely, so location does not matter
- Later: US firms on the IRS calendar. **Never mix the CRA and IRS calendars in one build.**

The problem we sell against

1. **This is the profession's own number-one workflow problem.** In a survey of 367 firm owners, "getting information and documents from clients" was the single biggest challenge, cited by **65.2%** — up from 53.8% the year before. Around **87%** of accounting professionals name client delays their leading workflow disruptor.
2. **The chase lands on the most expensive person** — the senior preparer or partner, because they are the ones who know what a complete file looks like. Firms report **5+ hours a week** just coordinating document requests.
3. **Every late document costs twice.** A return can't start until the file is complete, so each trickle-in means re-opening the file, re-reading where it stood, and re-deciding what's missing — then doing it again next week.
4. **It compresses the season.** Files that were workable in February all become "complete" in the final fortnight. Firms file extensions for clients who sent everything — just slowly.
5. **Chasing by email teaches clients to email sensitive documents.** The chase itself creates the data-handling risk.

What we install

Tier 1 — Document Chase (the wedge) Builds each client's expected-document list from last year's file, detects what is still missing, sends reminders that name the actual missing items (not "your documents"), escalates to the partner when a client goes quiet, and logs every touch with a date.

Tier 2 — Client Onboarding Chase New client comes in → engagement letter sent → document checklist issued → items collected and confirmed → file marked ready. Nothing reaches a preparer half-built.

Tier 3 — Deadline Command Centre Everything above plus every filing deadline across every client on one calendar — T1, T2, T4/T5, GST/HST and instalments — with a live ready / not-ready view and an audit-ready export.

Where the proof comes from

We have no client case study yet — say so plainly. The proof at this stage is the measured

industry data above, and the free Chasing Audit, which produces *their* number rather than ours. The moment client one has 60 days of data, replace this section with the before-and-after (see 01-discovery-questionnaire.md for exactly what to record).

Why us

- **We run the chase for you.** We are not another portal for your team to log into and configure. That is the entire difference between us and practice-management software.
- **You never hand us tax documents.** We track checklist *status* only; the documents stay in your own portal or drive.
- **One workflow, live in about a week.** No six-month transformation programme.

Call to action

“Book a free 20-minute Chasing Audit.” We count what chasing currently costs you per season, then show you what the same week looks like without it. No obligation.

What we are NOT (say this out loud, it builds trust)

- Not tax advice and not tax preparation — we never touch the return
- Not practice-management software (Karbon, TaxDome, Financial Cents) — those are tools *you* operate; we operate the chase for you
- Not a bookkeeping outsourcing service, and not document storage