



basswood

FOUNDATIONS FOR SUCCESS

STRATEGY DEVELOPMENT

Strategy Phase

Everything is starting to take shape during the Strategy phase. We begin configuration of your QuickBooks Online account – making sure it's setup to support your business.

We advise on the best subscriptions, integrations, and settings for your business, so data is well organized, payroll stays on schedule, and compliance is maintained with ease.

Our Approach

At Basswood, we believe the best results come from working together. Our onboarding process is designed to create alignment from the very beginning.

We take the guesswork out of managing your finances so you can focus on growth. By staying connected and maintaining consistency, we can support you on your journey to success.

QuickBooks
Online Setup

Process
Development

Workflow
Assignments