

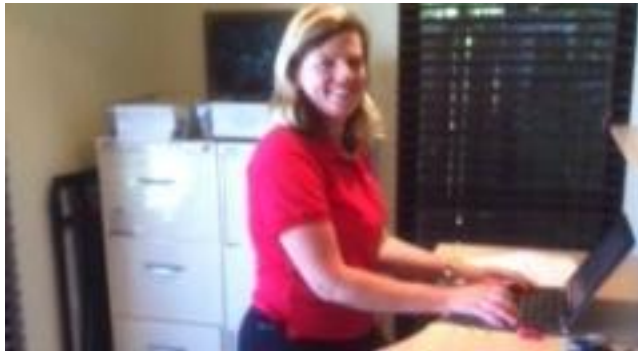


We Fired Our RPA Provider & Built Our Own BAS Bots!

You Can Too.

SMART BUSINESS SOLUTIONS

A BIT ABOUT US



Shannon Smit – Founding Director

2007 - SMART WAS BORN

Single Owner.
Spare room at home.
Big Plans. Big Ideas.



Multiservice Firm. Multi Award Winner.

2025 – 21 TEAM MEMBERS

Accounting & Tax. Business Advisory.
Financial Planning. Mortgage Broking.
No Acquisitions. 100% Organic Growth.
No Outsourcing.



2025 Innovator of the Year

AI-FIRST FIRM

Early adoption of AI to improve and enhance
operations and customer experience.

OUR RPA JOURNEY

FROM OUTSOURCING TO IN-HOUSE



STEP 1 - OUTSOURCED

External Developers.
\$3.2k per process +
\$5K/month license.



STEP 2 - CHALLENGES

Slow and Fragile.
8 months = Only 1 BAS Bot
Bots broke with updates.



STEP 3 – DISCOVERY

Found New Approach.
Daryl Aw (Singapore RPA Trainer).
2 Day On-Site Training for 20 staff.



STEP 4 – TURNING POINT

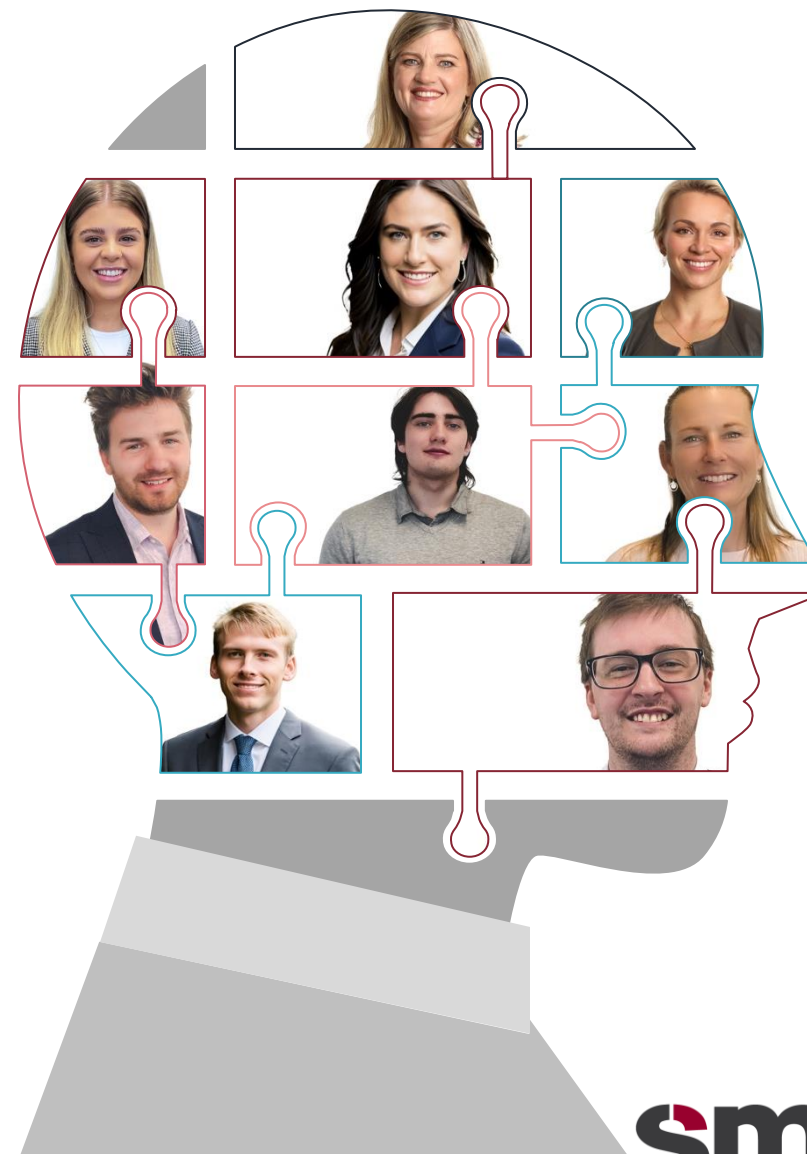
Built our own BAS Bot (937 steps)
+ Xplan Bot.
We CAN do this ourselves!

■ CASE STUDY

INNOVATION HAS GONE VIRAL INSIDE OUR FIRM

The Big Takeaway:

Our people are solving their own problems, sharing what they learn, and creating momentum that just keeps growing.



TRAINING, TOOLS & TIME

THE IMPORTANCE OF TIME TO PLAY

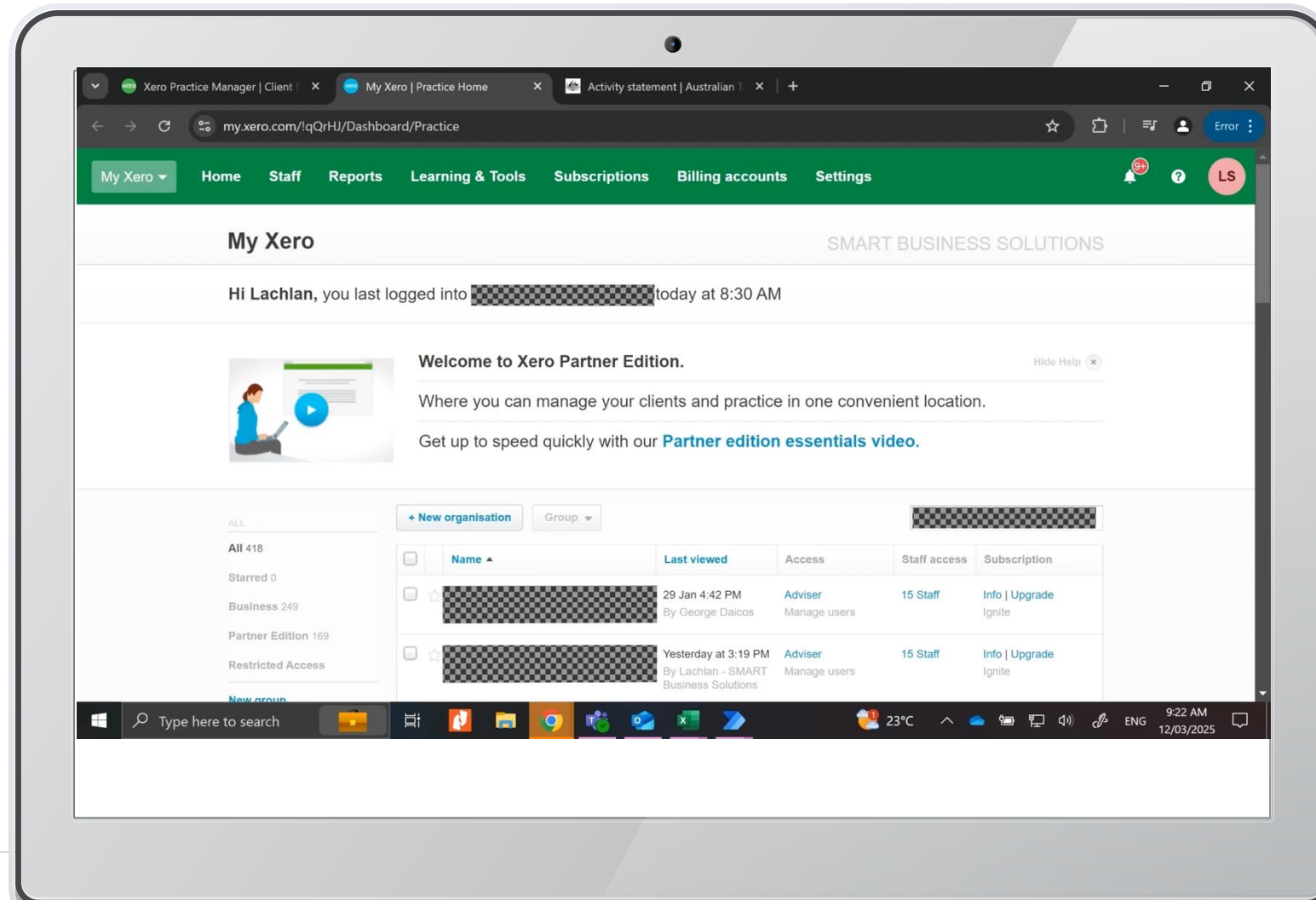
INNOVATION COMES FROM PLAY

KEY TOOLS



TRAINING, TOOLS & TIME

POWER AUTOMATE IN ACTION



INNOVATION IS OUR OPERATING SYSTEM



RPA HACKS

FOR ACCOUNTING & ADVISORY FIRMS

