

# 2035 Vivid Vision

*Created for December 31, 2035*



# Our Vivid Vision



## Why This Vivid Vision Exists

This Vivid Vision brings the future into the present so anyone reading it can see, feel, and understand exactly where Step By Step Accounting stands ten years from now.

It clarifies what we are building—not someday, but now.

It aligns our team, attracts the right clients, and helps partners, spouses, and supporters understand what we are creating and why it matters.

This document is here so every person connected to Step By Step Accounting can confidently say:

**“I know where this company is going—  
and I want to be part of that future.”**

**Melissa L. Miranda, CPA**  
Owner of Step By Step Accounting,



# Our Purpose

Today, Step By Step Accounting has empowered over 100,000 entrepreneurs to achieve financial success and mental health.

Business owners all over the country feel calmer, more capable, and more in control because our work didn't just organize their numbers— it changed their lives.



## Our Core Values

Every team member, every client, and every decision reflects our five core values:

- Integrity — We do the right thing every time.
- Growth — We believe people and numbers should rise steadily.
- Purpose — We are driven by mission, not motion.
- Proactiveness — We anticipate needs before they become problems.
- Positivity — We show up with gratitude, optimism, and belief.

# Operations & Technology

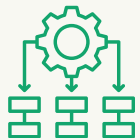
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We are a technology-forward accounting firm where advanced tools, AI, and streamlined systems drive exceptional client outcomes.



## Tech Standards

- All client calls, meetings, and messages are recorded and accessible to the serving team
- All laptops replaced every 4 years
- All Senior Accountants and leaders use Remarkables
- Every team member receives a \$200 annual office stipend



## Organizational Frameworks

We use:

- A tailored version of Traction (EOS)
- Concepts from The E-Myth
- The 7 Habits of Highly Effective People

These frameworks keep our rhythms consistent and our leadership aligned.



## Systems

- A powerful workflow platform keeps work organized and visible
- Every service has a job guide and menu
- All work and change orders are approved before completion
- Our IT provider maintains elite cybersecurity
- We maintain robust insurance: liability, E&O, cyber, fraud, HR practices



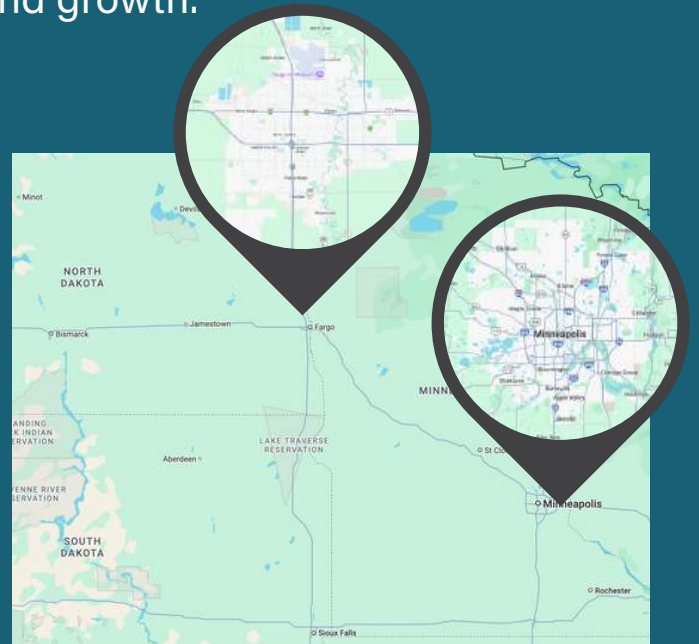
# Team & Culture

We operate with a deep and narrow organizational chart—a firm designed intentionally for excellence and growth.

The company has grown to 58 full-time professionals with two thriving hubs:

- **Fargo, ND**
- **Minneapolis, MN**

Every operational team member lives within two hours of a hub.



*We are fully remote, but connected, with co-working access as needed and virtual spaces that feel warm, polished, and unmistakably “SBS.”*



# Our Team DNA



Our people are well-trained, well-supported, and proud of their craft. Many team members hold advanced degrees or certifications: MBA, MAcc, CPA, CMA, EA, and more.

Training is a cornerstone of our culture:

- Weekly tactical technical meetings
- Monthly leadership training
- Monthly advisory skill development
- Regular conference attendance at local and national industry events

We acknowledge an essential truth:

*Being good at accounting doesn't automatically make someone a good leader.*

So we invest heavily in leadership development at every level.

## Leadership Philosophy

Leaders create leaders. Everyone “manages up,” communicates openly, and contributes ideas without hesitation. Our President is known for clear vision, strong culture stewardship, and unwavering support for the team.



## Culture of Belonging & Longevity

Our average team tenure is 5+ years. Team NPS scores remain consistently high.

### We gather in person each quarter for:

- A State of the Company address from the President
- Goal sharing and progress updates
- Skill development
- And something fun—volunteering, social events, or local adventures

We also celebrate our growth and achievements regularly.



## Work/Life Rhythm

Our team works an average of 37.5 hours per week (40 including breaks).

Core hours are 9 a.m. to 3 p.m., with flexibility around them.

### We take:

- **3+ weeks of paid vacation**
- **6 sick days**
- **9.5 company holidays**

Tax team members work only 4 extra hours per week during season.

We offer top-tier compensation, robust benefits, a 3.5% employer retirement match, and an annual \$200 home-office stipend.



# STEP BY STEP ACCOUNTING

## 2035 Organizational Chart

Executive Leadership



CEO  
Melissa L. Miranda

CRO

Senior Leadership

Director of Marketing

Director of Sales

Director of Operations

Team Leads

Team Lead

Monthly Accounting Services

Fargo Hub Leader

MI Hub Leader

Individual Contributors

Content Creator

Sales Associate

SA

SA

JA

JA

JA

JA

Diagnostic Reviews/  
Projects

QBO Training

SA

SA

SA

SA

SA

IA

IA

IA

IA

IA

JA

JA

JA

JA

JA

Pod 1

Pod 2

Pod 3

Pod 4

Pod 5

SA

SA

IA

IA

JA

JA

Pod 1

Pod 2

Executive Assistant

COO

Director of Finance

Director of Admin

Tax  
Tax Leader

Special Services  
Special Services Lead

Accounting Manager

Outsourced HR

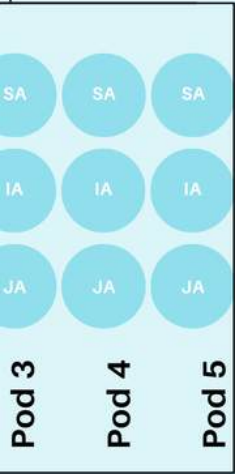
Receptionist

Outsourced IT

SR Tax  
JA JA

JA

PLS Sub leader



# Products & Services

We deliver high-quality, high-touch services including:

- Financial statement preparation
- Fractional Controller/CFO support
- Payroll
- AP/AR
- QBO setups, cleanups, and consulting
- Sales tax and 1099 filings
- Budgeting
- Cash flow forecasting
- Internal controls and pricing advisory
- Tax planning (exclusive to accounting clients)
- Tax preparation (exclusive to accounting clients)
- Partnerships, S Corps, C Corps, Nonprofit, and personal tax
- IRS representation
- Business valuation
- Exit planning
- Forensic accounting
- Group and one-on-one business coaching
- Workshops, seminars, and online classes
- Diagnostic Reviews (still a signature service)



# Our Signature Offering



## The QBO Help Line

Our national QBO Help Line is now a premium, trusted resource across the country.

Users can call during business hours or schedule online to receive immediate, expert guidance from certified accountants—not bots. It is one of the most sought-after services in the QBO ecosystem.

# Sales & Marketing



## Our Sales Philosophy

We create a garden that butterflies naturally fly into instead of chasing the butterflies with a net. We don't chase; we attract. Our marketing is magnetic—warm, expert, and trustworthy. Yet we are persistent in pursuit of the entrepreneurs who genuinely need our guidance.



## Thought Leadership

Melissa is now a paid speaker with a packed calendar of keynote and breakout sessions. She has published the first of her book series through a traditional publisher, and the launch process was handled with excellence. Her book is a WSJ Bestseller.

The firm hosts:

- Workshops
- Masterclasses
- A published season of a podcast
- Local networking events in ND and MN



## Digital Presence

Across Instagram, LinkedIn, Facebook, and YouTube:

- We have over 100,000 followers per platform.
- We publish long-form videos that become short-form clips.
- Our content is educational, relatable, and empowering.

We also have a strong “sell by chat” system and a streamlined front-door sales process supported by a professional sales team.

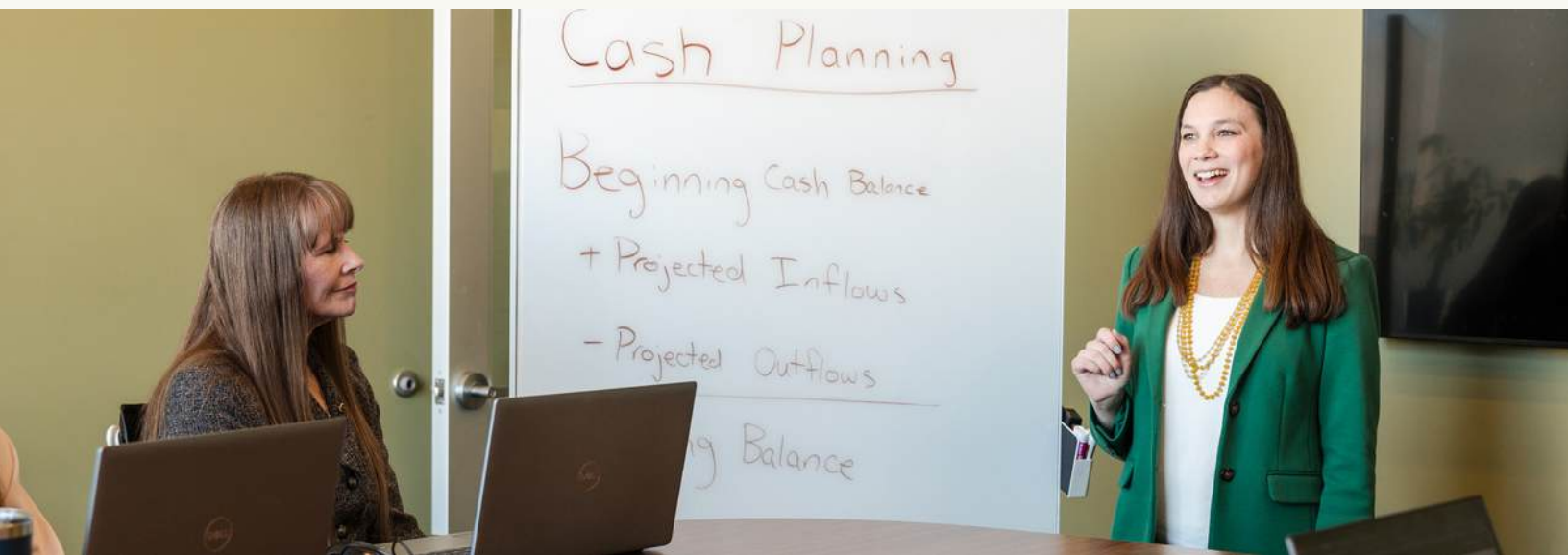


## Pricing

We charge premium rates grounded in:

- Value
- Expertise
- Proven outcomes

Our reputation supports those rates—and clients gladly pay them.



# Media & Recognition

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Step By Step Accounting is a decorated, trusted brand across the Midwest and beyond.

We have received:

- Top 50 Woodard Accounting Services Firm
- Best Place to Work Award
- FMWF Chamber Small Business of the Year



Melissa has received:

- SBA ND Small Business Person of the Year
- Top 100 QuickBooks ProAdvisor (every year)
- #1 ProAdvisor in the U.S.
- Top Women in Accounting
- Top Accounting Influencer



**2025**  
Insightful Accountant®

**TOP 100**  
ProAdvisors

# Our Client Experience

Our target clients are growing entrepreneurs who value clarity, integrity, and partnership. They operate in ND or MN, use QBO, and generate \$600,000–\$10M in annual revenue.



## Expectations & Standards

Our clients:

- Provide all requested information on time
- Treat the team respectfully
- Engage actively in advisory conversations

Those who don't align with our values are invited to leave.



## Communication

We respond to all client messages within:

- 1 business day (acknowledgment)
- 1 week (resolution, when possible)

Our onboarding is polished:

- Files are cleaned within 1 month of kickoff
- Clients receive proactive advisory from day one

## Client Transformation

Working with Step By Step Accounting is one of the best decisions they make for their business.

Clients feel:

- Less anxious
- More knowledgeable
- Empowered
- Confident in decision-making

They understand their numbers and see measurable improvements in their business health.

Within one year:

- 60% of clients achieve "strong" scores on the Strong Business Assessment



## Reporting & Insights

Clients receive:

- Professional PDF financials
- Advisory summaries
- Visual dashboards (for high-end clients)
- Consistent insights powered by AI and reviewed by Senior Accountants

Our tax planning is recognized as exceptionally proactive and thorough.

# Financials & Community Involvement



**Step By Step Accounting has reached \$5,000,000 in annual revenue — \$417,000 per month. We now serve around 200 monthly clients across five fully formed pods in our two hubs.**

We follow the same discipline we teach:

- No debt
- A fully open line of credit
- Two months of operating expenses in reserve
- Weekly 12-week cash forecasts
- Quarterly rolling 12-month budgets

Every fully burdened \$1 of wages produces \$3 in revenue.

We maintain a 20%+ net profit.

Revenue has grown 20–50% per year, leveling into stability at the \$5M mark.

To celebrate reaching \$5M in revenue, the Miranda family climbed Mount Kilimanjaro together in 2035. It became a defining symbol of the company: anything is possible, step by step.



**We give 1% of revenue to charities chosen by the team. We host a firm-wide volunteer day and invite clients, partners, and community leaders to join. It's become one of our most beloved annual traditions.**



# Step By Step

## A C C O U N T I N G

**This Vivid Vision is not a dream.  
It is a blueprint. A guide. A promise.**

**It shows exactly who Step By Step Accounting becomes by 2035—  
and why that future is worth working toward today. Every policy,  
every hire, every client interaction, every training, every morning  
routine inside this company is a step toward this vision.**

**And step by step, with purpose, integrity, and heart—**

**we make it real.**



**West Fargo, North Dakota, USA**



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