



ACCUM**ATIC**

**Optimizing Back Office
Operations with Automation**

October 2025

Introductions



Jen Speerbrecher
VP of Operations

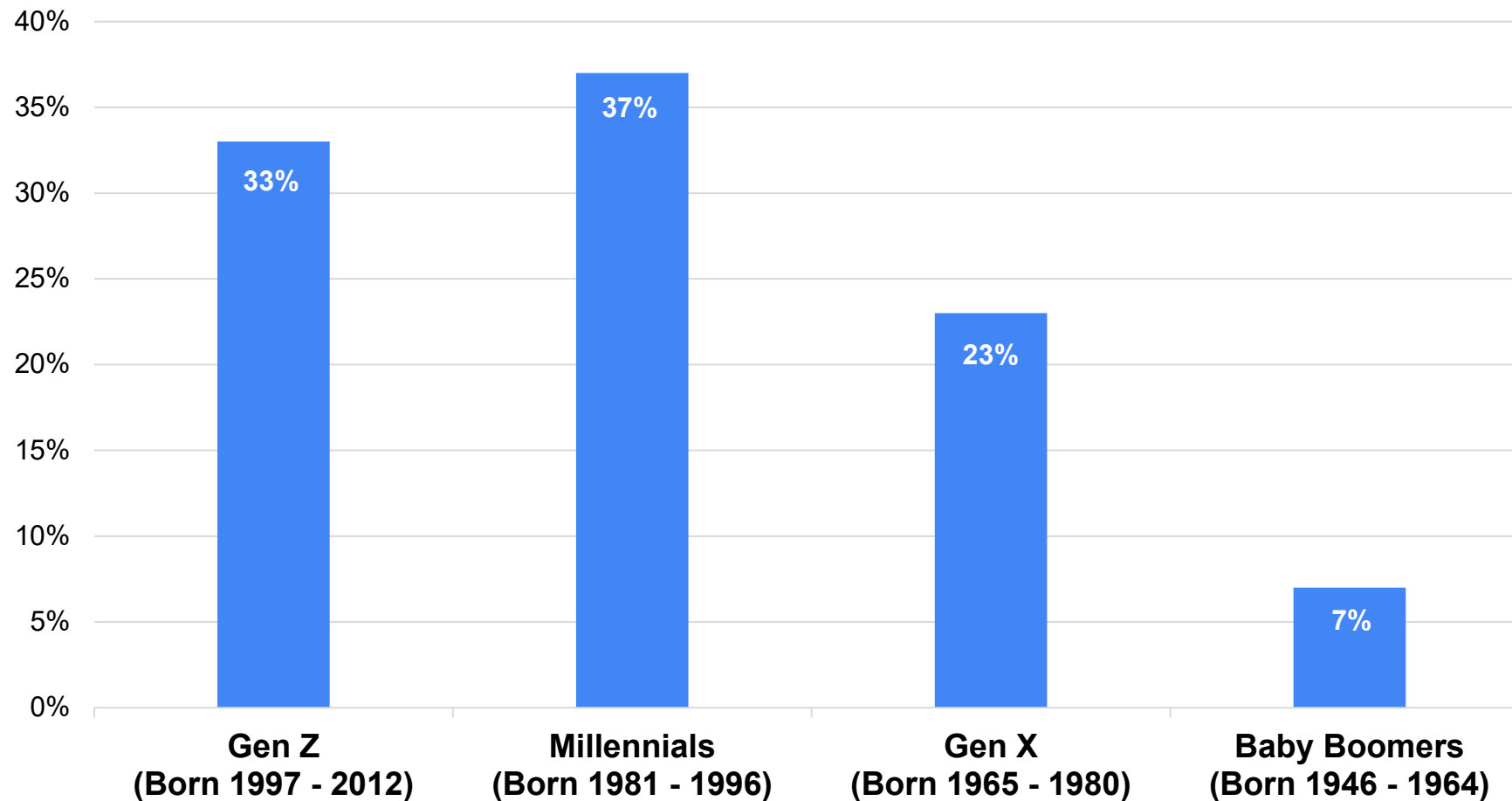
- 25+ years in automotive accounting
- Beta Client before working at Accumatic
- Entire Client Success team is from the Industry

**a (not so)
hypothetical
scenario**

Workforce by Generation

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Projected Workforce Breakdown by 2030



Workforce Statistics

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1.5-2.4

Average Tenure (yrs)

91% of millennials expect to be in a role less than 3 years

\$439K

Annual Turnover Cost

Direct and indirect costs, including recruitment, training, and productivity losses

88%

Hiring Challenges

Dealerships struggle to find qualified applicants with necessary skillsets

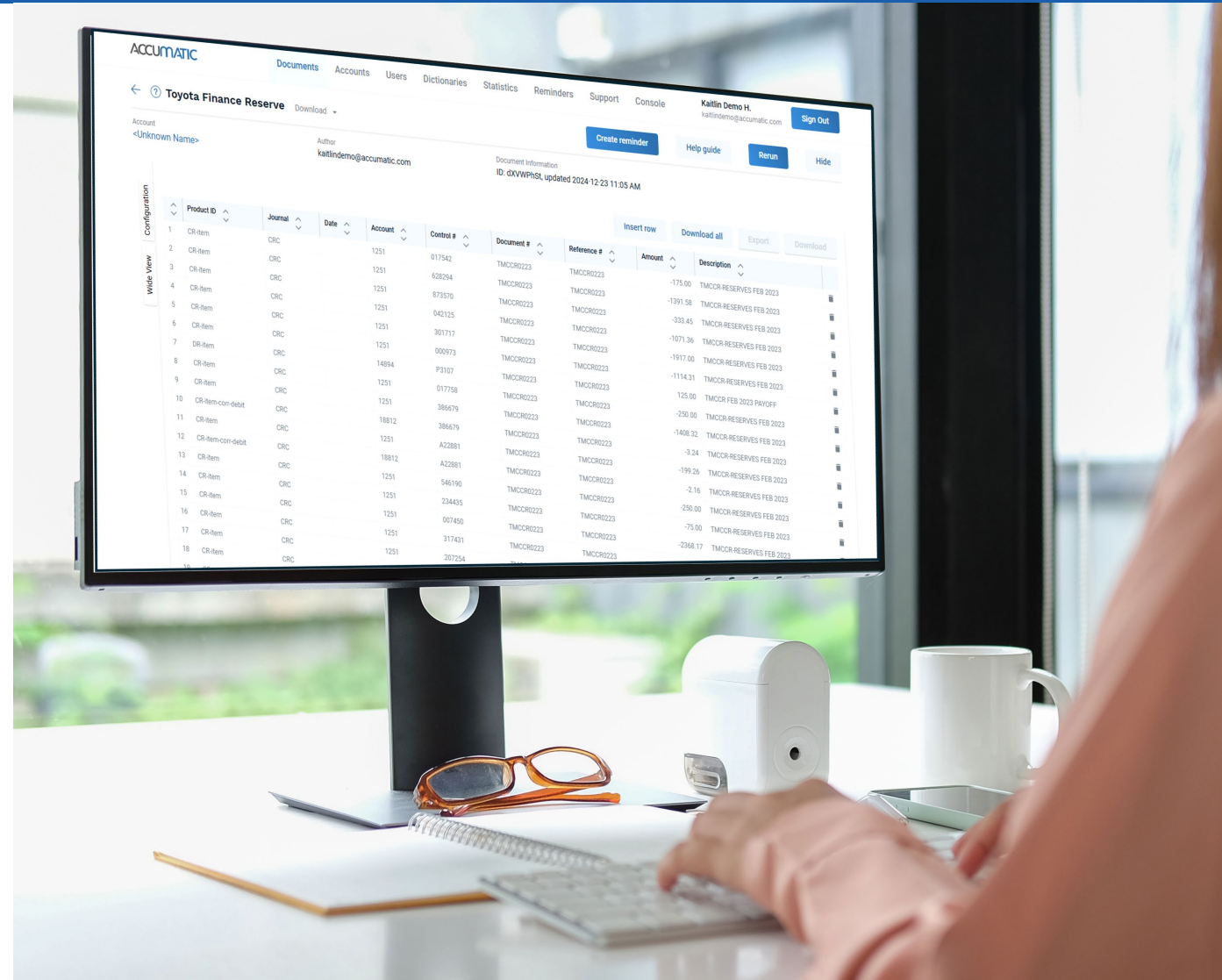
Accounting Workforce

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For the last decade, there is a 7% YoY decrease in candidates taking the CPA exam

75% of the CPA workforce hit retirement age in 2020

Knowledge Transfer Gap – critical expertise is leaving the industry faster than it can be replaced



**weathering
the storm**

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Weathering the Storm

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**Remove
administrative
burdens from
tenured
employees**

1 Distribute routine tasks

2 Elevate the Controller role

3 Cross-train employees

Weathering the Storm

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Investing in Your Team Through Upskilling

- 1 60% of workers prefer professional development over regular raises
- 2 53% of workers say professional development will keep them at their job longer
- 3 71% of workers say upskilling increased job satisfaction

**so, what about
technology?**

Employee Perspective - Technology ACCUMATIC



- 93% of dealership employees want better technology solutions
- Technology is valued similarly to PTO and health insurance
- Boost morale and job satisfaction

① Technology adoption is no longer optional. It's a crucial factor in attracting and retaining quality talent in today's competitive market.

Operational Efficiency

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- Free up time for strategic work
- Process Retention = your controller's brain in a jar!
- More easily onboard new hires
- Reduce costly manual errors

i Automation captures and applies your accounting team's expertise to streamline complex tasks, reduce errors, and ensure consistency.



Accuracy & Financial Impact

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- 33% of accountants make weekly errors
- Errors are paid for twice: once to make, once to fix
- Technology leads to a 75% reduction in accounting errors

i Faster and more accurate accounting allows dealerships to make better informed decisions.

Supplementing your Workforce

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- Staffing ebbs and flows, but your books depend on consistency
- Give people more responsibility without worrying about mistakes
- Make your staff more efficient, more valuable, and stickier at your dealership

i Automation can be used to increase the productivity of your current staff, or maintain productivity when headcount is reduced.



**Accumatic's mission is to
Automate Data Entry and
Save Time and Money for
dealerships.**

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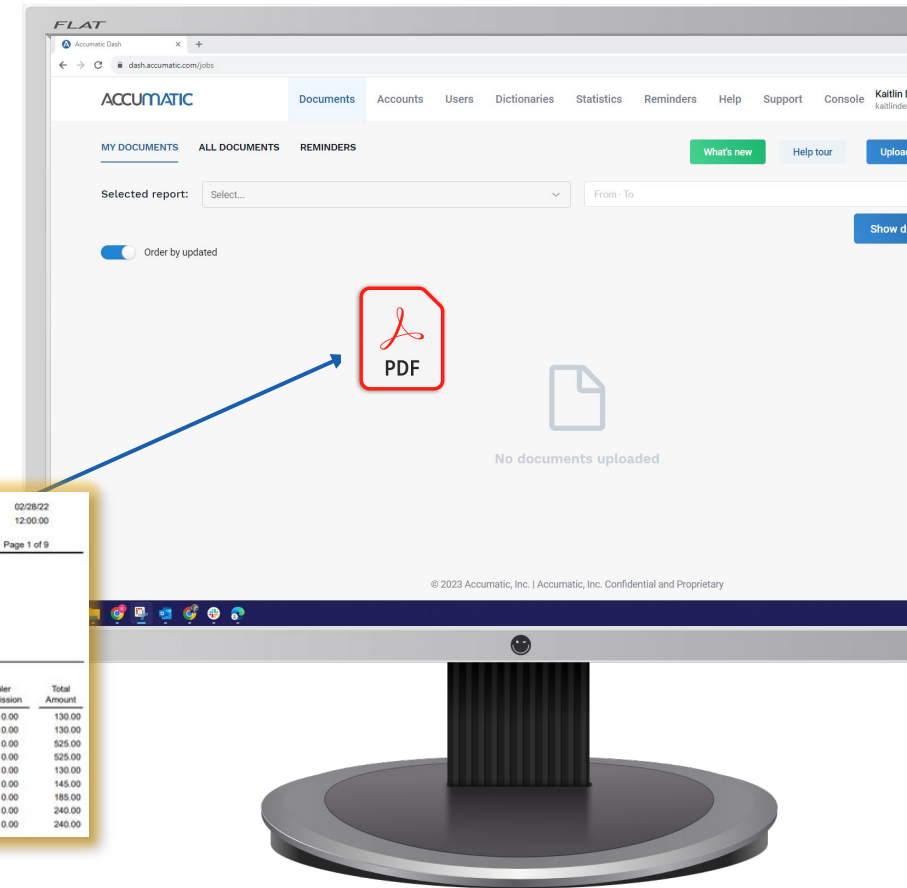
To Use Accumatic

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1 Upload OEM reports or other reporting to Accumatic

2 Watch your data transform in seconds

3 Upload or Power Post back to your DMS



TOYOTA FINANCIAL SERVICES **TOYOTA MOTOR INSURANCE SERVICES, INC** Run Date: 02/28/22
TMIS AGREEMENT INVOICE Time: 12:00:00
Report No: 130 - 14431 I01WX IIS02 Page 1 of 9
[Invoice Search](#)

FROM: TOYOTA MOTOR INSURANCE SERVICES
6965 HEADQUARTERS DR
PLANO, TEXAS 75024

REMIT TO:
INVOICE FOR INFORMATION ONLY
SEE MONTH END STATEMENT OF ACCOUNT
(PARTS STATEMENT) FOR PAYMENT

PREPAID MAINTENANCE SECTION

PPM AGREEMENT BILLING:

Applic. #	Agmt. #	Application	Effective	Issue	VIN	Customer Name	Plan Code	Price	Tax	Dealer Commission	Total Amount
N59N08	33861204	02/21/22	02/21/22	02/25/22			SBG	130.00	0.00	0.00	130.00
N59N03	33861205	02/19/22	02/19/22	02/25/22			SBG	130.00	0.00	0.00	130.00
N59H28	33861206	02/18/22	02/18/22	02/25/22			SYJ	525.00	0.00	0.00	525.00
N59H36	33861207	02/21/22	06/03/19	02/25/22			SYJ	525.00	0.00	0.00	525.00
N59P10	33861208	02/21/22	02/21/22	02/25/22			SBG	130.00	0.00	0.00	130.00
HB086Y	33863474	02/22/22	02/22/22	02/25/22			SWA	145.00	0.00	0.00	145.00
N59P14	33863697	02/22/22	02/22/22	02/25/22			SWC	185.00	0.00	0.00	185.00
SC837X	33864526	02/25/22	02/25/22	02/25/22			SBB	240.00	0.00	0.00	240.00
SE768X	33864527	02/24/22	02/24/22	02/25/22			SBB	240.00	0.00	0.00	240.00

Most Common Reports

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Factory Reporting

Rebates & Incentives
Holdback Credits
Floorplan Credits
Advertising Credits
Wholesale Credits
Warranty Claim Credits
Specific Program Credits
Parts Invoices
Factory Statement Recon
Misc. Expense Invoices

3rd Party F&I Reporting

VSC/ESC Remittances
GAP Remittances
Prepaid Maintenance
Wheel & Tire Remittances
Key Remittances
Finance Reserve Stmts (3)
Funding Notices
Ancillary Remittances

Vehicle Invoices

*New Vehicle Invoice Posting

*not available on R&R at this time

Payroll & HR

Payroll Imports
Benefits (4)
Tech Flag Postings
Service WIP Recons

Reconciliations

Flooring Reconciliations
Bank Statement Recons (4)

Licensing

Remittances
Schedule Cleaning

Add-Ons

Merchant Credit Card Posting
AP Credit Card Posting
AP Vendor Stmt Recon
Custom Reconciliations
Unique Misc. Reports

*Numbers in () indicate number of statements included in bucket

Return on Investment

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Based on 1 Dealer Code	Average time spent per month	
	Hybrid Manual/Excel Process	ACCUMATIC
Factory Reporting	41.5 Hours	3.5 Hours
3 rd Party F&I Reporting	48 Hours	3.25 Hours
Payroll & HR	8 Hours	.5 Hours
Reconciliations	21 Hours	4 Hours
TOTAL	118.5 Hours Labor Cost: \$5,471	11.5 Hours Labor Cost: \$536

Texas Dealers will save ~\$46,656/year

All numbers are estimates based on industry experience, knowledge, and customer feedback.

Key Takeaways

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1

The accounting workforce is shifting. Prepare for continuity and succession now

2

Upskill staff to boost engagement and long-term value

3

Leverage automation to improve back-office efficiency and “plug the holes” with staffing challenges



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Questions?



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THANK YOU!

- <https://www.cdkglobal.com/dealership-accounting-woes-and-fixes>
- <https://us.dealertrack.com/wp-content/uploads/sites/2/2024/03/9-ways-to-reduce-turnover-and-improve-retention-a-dealer-principal-s-guide-to-hiring-and-retaining-talent.pdf>
- <https://www.linkedin.com/pulse/2030-forecasted-generation-global-workforce-headcount-mainga-lytgf/>
- <https://www.gartner.com/en/newsroom/press-releases/2024-02-21-gartner-survey-shows-that-a-third-of-accountants-make-several-error-per-weeo-due-to-capacity-constraints>
- <https://www.cbtnews.com/why-every-car-dealership-needs-an-upskill-plan-for-their-staff/>
- <https://www.umassglobal.edu/news-and-events/blog/professional-development-benefits>
- <https://www.shrm.org/topics-tools/news/all-things-work/how-learning-development-can-attract-and-retain-talent>
- <https://www.aicpa-cima.com/professional-insights/download/2023-trends-report>
- https://92986.fs1.hubspotusercontent-na1.net/hubfs/92986/Guides%20and%20Downloads%20Files/Hireology-Future-of-Hiring-Automotive-2024.pdf?utm_campaign=2024%20auto%20employer%20study&utm_medium=email&_hsmi=292066303&_hsenc=p2ANqtz--kCVB3ALVaSYVBPf4kkIYJW-8L5PMBkactV97-KP7V0xBPu4Fdng2h5DIR6JlqjcyMqUDeWw4QYwMCv2UcFAv08kuDnw&utm_content=292066303&utm_source=hs_automation