Company: Lighthouse Accountants
Company Description: Lighthouse Accountants is in the business of empowering entrepreneurs to keep their evolving visions a reality. We do this by providing a caring financial support system that pivots alongside them and their wealth goals. Over the past 9 years we've helped over 150 families grow and protect their legacy.
Nomination Category: Achievement Categories
Nomination Sub Category: Achievement in Digital Transformation
Nomination Title: Sally Freeman's Achievement in Digital Transformation

1. Which will you submit for your nomination in this category, a video of up to five (5) minutes, explaining the nominated achievements since July 1 of 2023, OR written answers to the questions? (Choose one):

   Written answers to the questions

2. If you are submitting a video of up to five (5) minutes in length, provide the URL of the video here, OR attach it to your entry via the "Add Attachments, Videos, or Links to This Entry" link above, through which you may also upload a copy of your video. If you are submitting written answers to the questions, provide them in the appropriate spaces below:

3. Briefly describe the nominated organization: history and past performance (up to 200 words):

   Total 170 words used.

   Sally Freeman is the Business & Practice Director of Lighthouse Accountants, a boutique firm based in Sydney, Australia. She has been with the practice since its foundation stage in 2016 and is responsible for operations, technology adoption, client services, sales, and marketing. Her leadership also includes recruiting and onboarding staff, training and management of offshore team members, workflow oversight, and structured accountability and review processes that support both service quality and professional development.

   Historically, Lighthouse operated as a traditional compliance firm, with processes that were largely manual. Over time, Sally has introduced systems that improved client onboarding, document security, and service delivery. By 2022, Lighthouse had grown to serve over 150 families and their small businesses, supported by a hybrid onshore–offshore team.

   Sally's focus has consistently been on building sustainable systems that balance compliance requirements with efficient service. She has a track record of guiding the practice through regulatory change, supporting staff training, and embedding secure processes. This groundwork positioned the firm to undertake a major digital transformation in 2024–25.

4. Outline the organization's achievements since the beginning of last year that you wish to bring to the judges' attention (up to 250 words):

   Total 252 words used. If the word count is more than 25 words over the limit, please deduct one (1) point from your score.

   Between March 2024 and July 2025, Lighthouse completed a digital transformation program focused on security, automation, client experience, and community impact.

   Client Security & Compliance

   - Implemented ATOmate to automatically redact TFNs, password-protect ATO mail, and deliver via SMS verification.

   - Rolled out Practice Protect across all devices, adding user-level app controls, phishing detection, and staff cyber training.

   - Created a secure TFN collection process using Microsoft Forms and Microsoft Lists, storing data in a restricted-access list.

   Workflow Automation

   - Reached 98% adoption of Ignition direct debits, saving ~3 hours per week in invoicing and quoting (~AUD $8,112 annually).

   - Automated client onboarding through Microsoft Forms, Zapier, and Financial Cents, cutting setup time by ~75%.

   - Built a Dividend Statement Tool on Lovable.ai that syncs with Financial Cents and saves AUD $920 per month compared to external software.

   Client Communication & Collaboration

   - Rebranded the website with direct access to the Financial Cents client portal; 97% of clients now use it, reducing email reliance by 60%. Clients report greater confidence in the security and timeliness of communication.

   - Deployed Microsoft Teams Phone, with a 20% increase in clients receiving immediate phone support.

   - Introduced Fireflies.ai to record and transcribe 490+ meetings, saving ~5 hours per week in note-taking (260 annually) and improving task follow-up.

   Community Impact

   - Embedded B1G1 giving into workflows, with lodgements and invoice tags automatically triggering global impacts. This automation has delivered 2,194 days of clean water, 75 health impacts, and 58 education impacts. Clients value selecting projects themselves, making compliance work feel more meaningful.

5. Explain why the achievements you have highlighted are unique or significant. If possible compare the achievements to the performance of other players in your industry and/or to the organization's past performance (up to 250 words):

   Total 142 words used.

   Lighthouse has fewer than 10 staff, yet Sally has implemented systems usually found in mid-tier firms. Compared to industry peers:

   - Less than 10% of small firms currently use Fireflies, Practice Protect, or secure client portals, while Lighthouse has achieved near-universal adoption of all three.

   - 97–98% adoption rates for portal use and direct debits exceed typical client uptake benchmarks, where many firms struggle to reach 50%.

   - Onboarding and ATO mail handling were previously manual; they are now 90% automated, cutting ~40% of administrative time.

   - Automation of B1G1 giving is unique in the accounting sector, directly linking compliance events to community impact, with results tracked against UN Sustainable Development Goals.

   These achievements are significant because they demonstrate that a boutique firm can achieve digital maturity and security standards comparable to much larger practices, while delivering measurable benefits to clients, staff, and the wider community.

6. Reference any attachments of supporting materials throughout this nomination and how they provide evidence of the claims you have made in this nomination (up to 250 words):

   Total 132 words used.

   - Attachment A: Loom video link — *Introducing clients to Financial Cents (client portal training)*.

   - Attachment B: Zapier automation workflow connecting Ignition to Excel for billing automation.

   - Attachment C: Workflow diagram showing onboarding integration with Microsoft Forms, Zapier, and Financial Cents.

   - Attachment D: Screenshot of Financial Cents client portal homepage.

   - Attachment E: Fireflies.ai example transcript summary.

   - Attachment F: Fireflies + Zapier automation screenshot showing Teams channel summaries and Excel logging.

   - Attachment G: ATOmate SharePoint configuration screenshot.

   - Attachment H: ATOmate email template workflow for Notices of Assessment.

   - Attachment I: Client-facing B1G1 "Choose Your Impact" screenshot.

   - Attachment J: B1G1 impact dashboard and example zapier workflow

   - Attachment K: Screenshot of Lighthouse's Dividend Statement Tool built on Lovable.ai.

   These attachments provide both technical and client-facing evidence of the systems implemented, their adoption, and their impact.

Attachments/Videos/Links:

Sally Freeman's Achievement in Digital Transformation

[REDACTED FOR PUBLICATION]