

## Auditors, Accountants Find New Purpose and Renewed Happiness With FloQast

For most auditors — and even more accountants — the idea of leaving the world of audit or accounting for a position with a SaaS company isn't a desirable option.

After all the hours spent in classes and studying, working on engagements, and stressing over the CPA exam, the idea of leaving it in the past for something as foreign as software sales, product development, or customer success is a hard “no.”

accountants for roles they weren't formally trained in.

All those hours spent studying for the CPA or crammed into a hot audit room, plus the overtime needed to close the books in three business days, are the bedrock for a company that has raised \$93 million in venture capital, employs over 200, recently expanded to the U.K., and boasts over 1,000 clients.

**“FloQast invests so much time and effort into proper training, and having other accountants who've been through it already available to help you. When you're surrounded by motivated, intelligent people who all want to see you succeed, it's almost impossible to fail.”**

**Brandon Malekie, CPA, Inside Sales Manager, FloQast**

That being said, if you're reading this, you're at least giving the idea *some* thought.

By now, you've probably heard that FloQast is made by accountants, for accountants. Catchy tagline, right? Solid marketing, for sure. But it's also *true*. Yes, the company was founded by former auditors and accountants who experienced firsthand the problem that FloQast now solves, but since launching, the company has hired dozens of former auditors and

The purpose of this case study is to focus on a handful of former auditors and accountants who decided to take a leap of faith and join FloQast in roles they didn't go to college for. We'll look at **why** they decided to make the move, how we set them up to succeed in their new roles, and how their lives have changed — yeah, a new job can change your life — since joining the team.

# “Joining FloQast was the BEST decision I’ve ever made in my life.”

## Were you apprehensive about moving to a new industry/role? What were some of your concerns about leaving audit to work in sales?

Absolutely. I had no idea if I had what it took to be in sales. All I knew was that I wanted out of audit and working perpetual busy-season hours. The hours were affecting my well-being, everyone around me noticed it, although it took me a while to come to terms with it. I was also scared about potentially burning bridges and leaving my team. But at the end of the day, I had to do what was best for me. The problem I see with folks leaving public is their lack of transparency with their team, whether this stems from embarrassment or wanting to avoid confrontation; the key to my amicable departure was starting the conversations early with my team and letting them know how I truly felt: I wasn’t happy and wanted to do something else.

## How do your skills/experience from your previous roles help you in your current role?

Every day, I apply my accounting and auditing experience as I interact with prospects. I’ve found that my background is extremely helpful during any sales call, because it helps break down barriers. I’m able to relate on a personal and emotional level, which builds credibility. My work ethic also has played a big role in my success at FloQast. Further, the beautiful thing about sales is that it reciprocates — unlike in audit, where when you do well, you get punished with more work. The amount of time and effort you put into sales directly equates with monetary gain, affirmation, and success.

## If someone in your prior position asked what you think about the transition to FloQast, what would you tell them?

This is literally verbatim what I’ve told people: “Joining FloQast was the BEST decision I’ve ever made in my life.” I took the leap of faith a little over a year ago and haven’t looked back. My overall well-being has improved significantly, I have more time (and money) to spend with my family and friends, and I love my job and LOVE talking about what I do. Both my mental and physical health have improved drastically. I’ve been able to pick up hobbies, go to the gym more consistently, reconnect with old friends, and be a better partner.

**I feel lucky to have found a company that values me as a person, invests in my personal and professional development, and lets me leverage my accounting knowledge and CPA — which gives me peace of mind, knowing that it wasn’t all for nothing.**



### Brandon Malekie, CPA

After graduating from Loyola Marymount University, Brandon Malekie spent a year as an assurance associate at CohnReznick before moving to EY where he added a “Senior” to that title and secured his CPA.

#### Current Role:

Inside Sales Manager

#### Joined FloQast As:

Business Development Representative (Later promoted to Senior Business Development Representative)

#### Before FloQast:

Assurance Associate, CohnReznick; Senior Assurance Associate, EY

# The Consultative Approach: Using Audit Experience to Make Accountants' Lives Easier

## What has it been like to transition into a sales role with FloQast?

When I first joined FloQast, the idea of doing cold calls or email blasts seemed a little daunting. **You go into it expecting a lot of angry responses, but this is business-to-business sales, and I think having my CPA and audit background establishes my credibility right off the bat.** I think it's a breath of fresh air to be able to introduce clients to FloQast and really use my background and take a consultative approach to help people find something that fits their needs.

## What's been the best part of joining the team at FloQast?

I just hit my two-year mark, and I realized that there hasn't been a single day where I was dreading coming to work or just feeling unmotivated. Coming to FloQast has literally changed my life. It helped me bring back the social skills I lost in audit. I love the people, I love the product, and I'm just happy.

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**Andy Stefan**, CPA, Account Executive, FloQast

## Because of all those long hours spent together, audit teams become pretty close. Is the FloQast Sales team like that?

Absolutely. It's like being in an audit room, but with 40 of your close friends. So, there's just a lot of comradery, the respect is mutual, and we know that we're all working toward one common goal together.

## How does the impact you have in sales at FloQast differ from that of your time in audit?

I always tell prospective customers that "I used to make your lives a little bit more difficult when I was in audit, but now that I'm introducing you to a product like FloQast, I get to make your lives a lot easier."



## Andrea Stefan, CPA

A San Fernando Valley native, Andy Stefan joined FloQast as a Business Development Representative in March 2019 after a year-and-a-half as an auditor at Deloitte. Since then, she's become one of the team's best success stories, rising beyond the BDR role to becoming one of the company's most successful Account Executives.

### Current Role:

Account Executive

### Joined FloQast As:

Business Development Representative (Later promoted to Senior Business Development Representative)

### Before FloQast:

Senior Audit & Assurance Associate, Deloitte



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# Leveraging Accounting Knowledge for Sales Success as a Business Development Representative

## What has it been like to step into a new career with FloQast?

Making the switch was the best career choice of my life. Being able to use my knowledge from my accounting experience while transitioning to a fast-growing, dynamic team like FloQast is a rare opportunity. I came in with accounting knowledge, and FloQast gave me every tool imaginable to set me up for success as a newcomer to sales. From day one, everyone here has made me feel right at home and I was hired remotely, which tells you a lot about the amazing culture here.

## How did your existing skill-set prepare you for success with FloQast?

Coming to FloQast with an accounting background helped tremendously. **Having an understanding of how a monthly close is performed helped me on day one because I had been in the seat of the prospect prior to joining FloQast, and knew the pains of closing without FloQast.** I had been that guy spending countless hours going line by line on an Excel book looking for discrepancies or having to call my team after-hours because I had a question on one of their recs. Knowing the accounting lingo and what a day in the life looks like for them goes a long way in building rapport with a prospect.

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**Garrett Watson, Associate Account Executive, FloQast**

## What was the most challenging part of transitioning to FloQast?

Having an understanding of audit procedures was a big help in getting up to speed quickly with FloQast. Knowing the day in the life of an auditor, all I really needed to learn once I got here was how FloQast helped since I was unfamiliar with close management tools prior to joining. This was the easy part since FloQast provides you all the support, training, and tools one would need to understand how FloQast significantly improves audit practices for accounting teams.



## Garrett Watson

A graduate of Cal-Sate University-Northridge, Garrett Watson joined FloQast as a business development representative in the midst of a global pandemic — hardly the ideal way to start out your career in sales. Since then, Garrett has solidified himself as a core member of the Sales team.

### Current Role:

Associate Account Executive

### Before FloQast:

Senior Associate, Marton & Associates, CPA's