



Increase the value of client advisory services with forward-looking financials

CPA.com and Jirav
Financial Planning & Analysis

All-in-one forecasting, budgeting, reporting, and dashboarding

Is your firm delivering the full range of advisory services your clients need today? From analytics and financial forecasting to strategic planning and annual budgeting, clients require more from client advisory service (CAS) practices. Meanwhile, delivering these types of advanced services at scale is the key to unlocking more revenue – which can be difficult when it comes to higher-value, advisory-level services such as forecasting and budgeting.

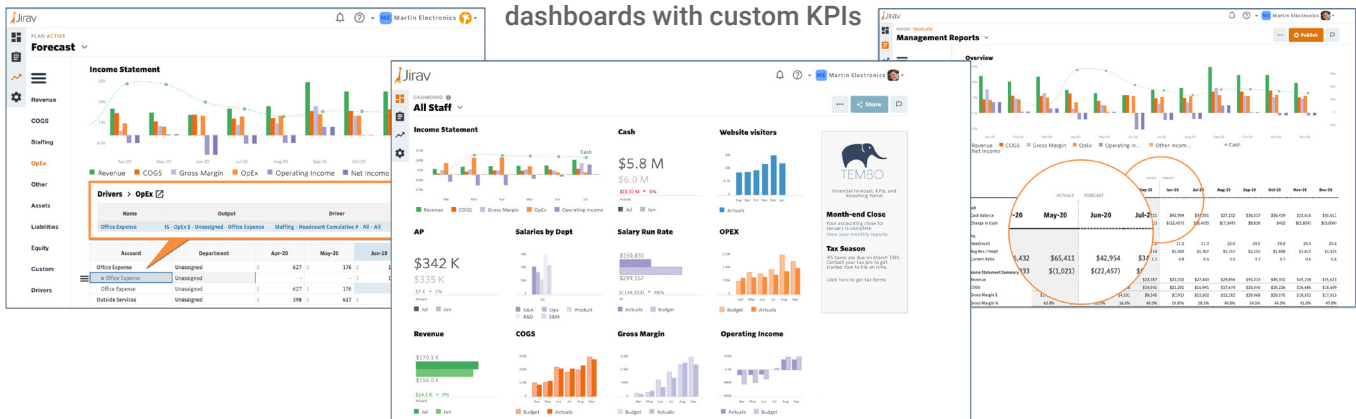
CPA.com and Jirav are here to help you scale advisory with the Jirav Partner Program. Jirav’s powerful financial planning and analysis solution gives firms an all-in-one platform for forecasting, budgeting, reporting, and dashboarding that allows you to maximize the value of your CAS services while saving time and reducing risk.

With Jirav, you’ll deepen your relationships with clients, grow revenue, standardize reporting, stand out from competitors, eliminate spreadsheets, and keep staff engaged with more meaningful work.

Smarter, faster, driver-based forecasting & budgeting

Modern & engaging dashboards with custom KPIs

Beautiful, tailored reporting & unlimited read-only sharing



Make a bigger impact with insight and foresight

Jirav is packed with the advanced capabilities firms need to take on some of their biggest CAS challenges, from the excessive amount of time spent on error-prone spreadsheets and manual report creation to the difficulty of producing accurate, insightful budget and planning reports that will engage clients. Jirav makes it easier for firms to elevate their strategic advisory services with polished reports and insights to give clients a clear picture of the current state of their business and help them anticipate what's next.



Scale advisory with a standardized process

Jirav makes it easy to create and update forecasts, budgets, reports, and dashboards using proven, standardized processes – without need for a partner or manager to be involved at every turn.



Grow revenue with strategic advisory services

Adding business modeling, departmental budgeting, customized KPI reporting, cash flow forecasting, and financial dashboarding to your firm's menu of services will help you increase revenue per client while delivering the higher-value services they need.



Automate the monthly reporting process to save time

If you're still exporting data to and formatting reports in Excel, your firm will save hours every month with Jirav. That's time you can use for higher value work to delight your clients and boost revenue.



Collaborate with clients for deeper relationships

With more meaningful, understandable client deliverables, your firm will improve engagement and collaboration with clients – which leads to more satisfied clients and improved client retention.



Keep staff engaged with more interesting work

When your professionals spend more time on higher-value, insight-focused work rather than formatting spreadsheets, they'll be more engaged and better prepared to deliver next-level value to clients. In addition to reducing client turnover, you'll also reduce staff turnover.



Stand out from your competitors

While your competitors are still emailing spreadsheets to clients, your firm delivers easy-to-read dashboards, reports, and plans that will impress and engage clients. Many firms leverage Jirav dashboards and reports as a tool in the sales process so clients can see what they'll get on a monthly basis.



Organize reporting for all your clients in one place

Whether your clients are on QuickBooks, Xero, Sage Intacct, Oracle NetSuite, or a mix of accounting systems, you can use Jirav to streamline your monthly reporting process. Jirav Partners can manage all their clients in their partner portal. They also get access to wholesale pricing and discounts only available to accounting firms.

Want to learn more about how Jirav can take your Client Advisory Services to the next level?

Start by visiting CPA.com/Jirav