

A comprehensive managed, service and technology solution

Insights

Advisor Program



Increase the speed of client onboarding and reduce the effort and time to recurring revenue.

Firms seeking a scalable model for delivering client value through client advisory services (CAS) face challenges with aspects of their CAS tech-stack deployment such as client implementation, onboarding and ongoing application and integration management.

As a result, opportunities are missed. When technology infrastructure and operational procedures lack standardization, obstacles such as staffing challenges and complex client requirements make it difficult to scale.

To streamline all aspects of your firm's CAS tech-stack deployment and management, we are introducing CPA.com Insights.

Available exclusively for qualified Sage Intacct Accounting Program (SIAP) partners, Insights is designed to get your CAS client engagements up and running in a fraction of the time which means you'll spend less time configuring systems and more time building your business and delivering greater client value with scalable, repeatable processes.

How it works:

- 1. Rapid client assessment framework** determines client system requirements in a matter of hours
- 2. Guided "configure, price, quote" process** produces standard systems and services pricing for your client system in hours
- 3. Streamlined deployment process** makes it possible to achieve go-live in as little as 30 days
- 4. Standardized integrated system designs** reduce staff learning curve and increase utilization for onboarding and accounting services
- 5. Pre-configured standard reports & dashboards** deliver timely visibility and control for clients and the firm
- 6. System & integration managed services** as an alternative to building in-house capability
- 7. Agile Accounting Cycle** options enable real time activity close and reporting



PROVIDES VERTICALIZED DESIGNS: Family Office, Professional Services, Software as a Service, Not-for-Profit, Real Estate, Restaurants, Private Equity and more!

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Supported with our Specialized Expertise

