# **Advisor** 8

# Accountants | SMBs Practice Management & Networking Platform

Drive Growth and Efficiency while Eliminating blind-spots, delays, frustrated clientele and overall churn for Your Firm



**80%** of Accountants say their Clientele is more frustrated than ever due to enormous delays caused by the lack of tools for practice management

Advisor∞ a single indispensable innovative, yet robust digital platform for supporting the community of Professional Accountants/CPAs/CAs/Book-keepers/Accounting ProAdvisors and their clients (whether they are individuals or small businesses). Advisor∞ is helping Accountants' day-to-day operations by streamlining their routing processes and enabling omnichannel collaboration of client activities

Advisor∞ platform and the ecosystem of applications and tools helps avoid the never-ending friction from operational activities by providing a robust cloud deployed SaaS solution supported by no-nonsense productivity apps, seamless client collaboration and engagement, and real-time transaction management.

## CHALLENGES

- Lack of visibility and control over pending transactions and delays leading to frustrated clients
- Growing number of Uncategorized transactions not getting addressed, causing delays in book updates
- Difficult to create, format and present proposals to clients as quickly as possible to gain new business

### **KEY BENEFITS**



- Proactive transaction management and quick client engagement eliminates operational friction
- Automated tools steer clients and accountants for accurate segmentation of 'UnCat' transactions and book updates
- Powerful self-guided tool helps create and present accurate and professionally formatted proposals within no time



Advisor 8 Platform is Built for SMBs, and Their Accountants "Earth's Most Accountant & SMB Centric App Ecosystem"

### **Futuristic Multidimensional Platform Capabilities**

Most Accounting Professionals face enormous challenges addressing transaction delays, clientele frustration and constant churn, while client acquisition costs are ever increasing

#### **Control and compliance**

- Import Client transactions from books automatically without delay
- Resolve uncategorized transactions and avoid posting delays and book updates
- Enable flaw-less collaboration across accountants, staff and clientele
- Share, store and archive sensitive documents and records securely

#### Productivity

- Create and present proposals at a lightening speed, with a self-guided tool that helps create proposal accurately, formats elegantly and presents professionally within no time, using predefined templates and embedded tools
- All applications and tools honor access-controls set by organization policies, enable secure transactions and easy to use retrieval tools across all applications



www.Advisor8.com help@advisor8.com