Professional Services

Exceptional Client On-Boarding Experience

Client: Leading CPA Firm in Atlanta with offices spread across North America.

Problem: High retention rate of newly acquired customers. Inefficiencies in on-boarding new customers due to manual processes. Long on-boarding cycle resulting in revenue loss.

Solution: Complete automation and optimization of client on-boarding processes. Identifying conflict of interest with partners and related entities. Native integration with Salesforce to minimize manual processing.

Benefits: Reduced client on-boarding time from 3 months to 1 week. Improved customer retention. Exceptional customer experience resulting in predictable revenue cycles.