ClientView™ in The Modern Firm®

Rootworks

Why ClientView is important in a modern firm

To help you build your modern firm, this eBook is dedicated to the topic of ClientView—Rootworks' powerful client data management tool that's included in membership.

It's all about data these days! Data provides you with deeper insight into your client base and their needs—enabling you to serve them in a more proactive manner. We'll highlight the value of having comprehensive client data at your fingertips, including demographics, technologies used, opportunities and projects. We will also detail how data can be applied to run a highly efficient, profitable and modern operation.

Data provides you with deeper insight into your client base and their needs.

ClientView: Dive deeper into your client data

Modern firms understand the necessity of using data to gain deeper insight into client needs. And this is why we developed ClientView, a powerful client intelligence tool within our Modern Firm Performance Platform. ClientView enables firms to aggregate multiple client data points and slice and dice information. With a deeper level of intelligence in hand, firms are better equipped to adopt a proactive stance on the products and advisory services offered to clients.

The short of it: The more you know about your clients, the better equipped you are to advise them on the products and services that can help improve their lives!

Here are just a few features that support complete visibility into client information:

1 Client Dashboard

Within the dashboard, you can easily identify and filter clients based on a unique set of variables. For example, you can quickly identify how many QuickBooks® Desktop clients you have who provide you with a QB backup file, those who are using QuickBooks Pro 2017, or those using Bill.com for bill payment. You can also filter by services and monthly and annual recurring revenue associated with each service option. ClientView provides a panoramic view of your entire client inventory based on the tools used and services provided. Most firms do not have this level of information at their fingertips.

2 Opportunities

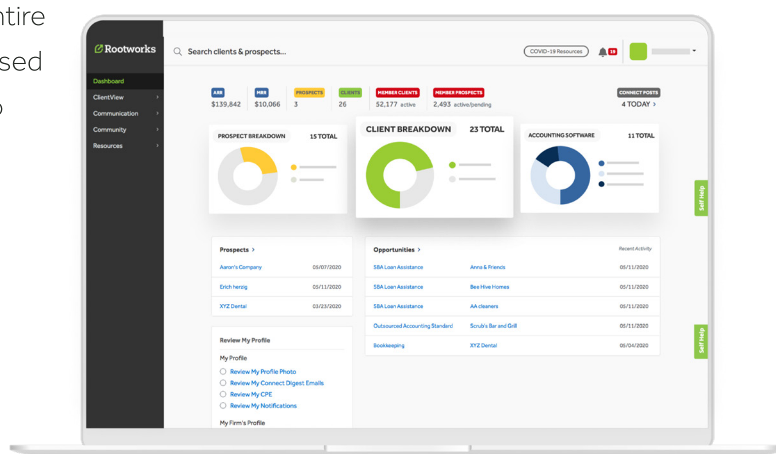
Based on client dashboard information, you can then identify and tag opportunities. For example, opportunities to move clients from existing technologies to the platform used in your firm. Or, clients in need of certain products, such as retirement plans or payroll. The opportunities you tag serve as a running list of clients in need of transition to the right technology and services within your defined business model.

3 Prospects

Maintain a current, organized list of prospects in a single space. This helps keep you focused on active prospects and communicating with them as you nurture each through to client conversion.

ClientView enables you to dig deep into your client information, providing a current and complete view into your data. Consider just a few ways you can filter data based on specific criteria:

- Retirement plan type or those without retirement plans
- Clients by industries served
- Those who don't use your payroll services
- Candidates for value-add advisory services
- Clients by product
- And so much more



Within an organized, real-time dashboard, you have immediate access to recurring revenue, detailed client data and opportunities.

How ClientView works

ClientView launches with an unfiltered dashboard where all of a firm's clients are displayed. Also on display are total annual recurring revenue, monthly recurring revenue and average monthly recurring revenue. This is data generated based on all clients in the system.

Rootworks advocates a recurring revenue model—a key component in growing a successful, sustain-able modern firm. ClientView offers a way to track annual, monthly and average recurring revenue over time so you always have a firsthand view of your financial progress.

Slicing and dicing your client data

Default client data within the dashboard is just the starting point. Within ClientView, there are several filters that enable you to slice and dice data to get to the information you need. You will continue to see updated recurring revenue totals within each filtered list.

The following are a few examples of how you can filter your client data to ensure you are taking advantage of every opportunity:

1 Demographics

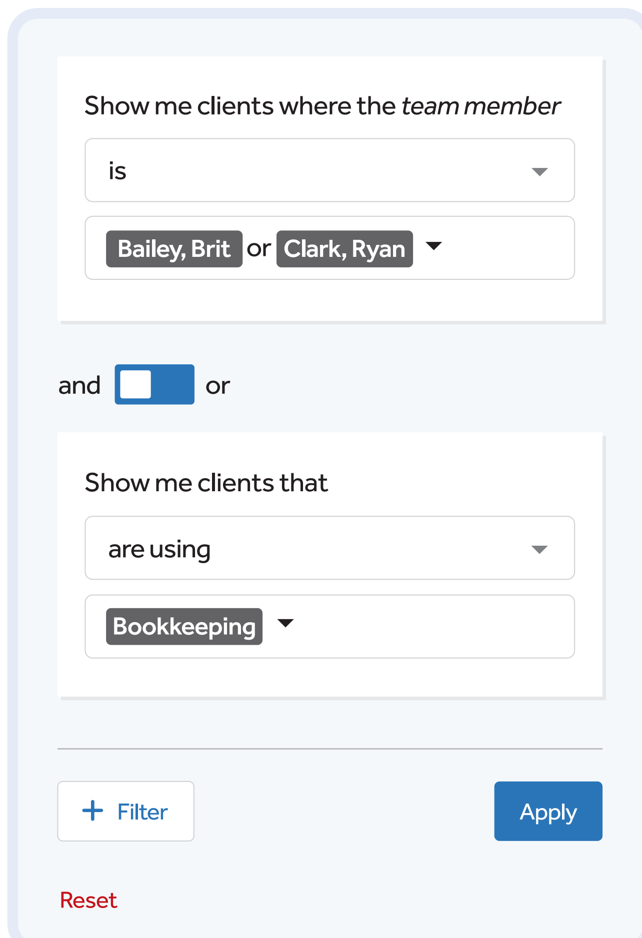
Filter data by industry and specialized checklists. For example, you can create a filter to show optometry clients (industry) with 401(k) plans. The list would display the clients that meet this criteria—supported by annual, monthly and average recurring revenue. You could also filter optometry practices that DO NOT have 401(k) plans. This would offer a list of potential opportunities—client prospects to whom you can sell 401(k) consulting services.

2 Services

Filter by services to identify upsell opportunities. For example, you can pull a list of all clients who do not use your payroll services. For those who are good candidates, you can reach out and promote payroll services as a valuable add-on. The ultimate goal is to increase recurring revenue in this service area.

3 Solutions

Filter on the technology tools your clients are using. This will help you identify clients who are using outdated technologies or are in need of additional technology tools you've implemented, such as Fathom, QuickBooks Online and others. This filter will help as you transition clients into your defined business model.



Easily apply filters to drill down into data and expand visibility into your entire client base.

Final words...

Knowledge is power and insight is everything! With deeper insight into your client data, you can more easily serve clients in a proactive manner—assessing their business needs and providing guidance and products to support their professional and personal success.

ClientView aggregates your client data into a single, convenient space where you can monitor progress on a daily basis. Track recurring revenues, opportunities for add-on services and needed client technology updates, as well as track projects assigned to staff who are accountable for executing on identified opportunities.

ClientView is where all your client data comes together—supporting you with much-needed transparency as you continue to identify ways to enhance your modern firm and, ultimately, make your clients' lives better.

Want to learn more about ClientView?

ClientView is a powerful client data aggregation and client intelligence tool built into our Modern Firm Performance Platform—one of the many benefits of a Rootworks membership.

If you want to learn more, please contact sales at membership@rootworks.com

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