



# Customizable, Scalable, & Affordable

A Reach Reporting Case Study

## The Company

ProvenCFO is an end-to-end solution for various accounting needs, including back office, financial reporting, advisory services, and external CFO with the goal to provide outsourced accounting services for businesses. Their focus is on delivering relevant, real-time, and reliable financial reporting for over 100 clients.

## The Challenge

Co-founder Dave Willson wanted to create a template for financial reports and apply it across all his clients, but he found it to be nearly impossible. Some software allowed him to customize a report but couldn't apply it to all clients. Other software could create a standard template for all clients, but it wasn't customizable. Additionally, many solutions were financially out of reach for the company.

## The Solution

By working with Reach Reporting, ProvenCFO created customized templates and standardized them across all its clients. The automation removed the tedious grind of punching numbers which increased efficiency for the company while improving the deliverables they provided to their clients.



We have finally been able to standardize and customize our deliverables.

Dave Willson - ProvenCFO



### TARGETED REPORTS

ProvenCFO now designs simple metrics and robust reports that auto-populate with specific data to improve their clients' business decisions with varying degrees of customization.



### BETTER DELIVERABLES

ProvenCFO now creates impressive, eye-catching reports that contain highlighted relevant client information, enhancing client's ability to make sound business decisions.



### INCREASE EFFICIENCY

ProvenCFO now produces templates that auto-populate for each of their clients, saving 30-45 minutes each month by removing much of the grind of creating reports every month.

### TO LEARN MORE

Visit us at [REACHREPORTING.COM](https://REACHREPORTING.COM) or call

**(877) 467-7637**

**90%**

Est. Improved  
Reporting Efficiency

**45**

Saved Minutes  
Per Client/Month

**100%**

Client Report  
Satisfaction

## Improved our firm's Deliverables.

Dave Willson. CFO of ProvenCFO.

Like most accountants, I prided myself in the level of value I offer. However, I noticed clients did not see value in the reports I was providing. I felt restricted by the reporting solutions available and did not have the time to produce and rebuild reports in a spreadsheet month after month.

I knew I needed to find a solution that could build reports our clients understood and appreciated. I knew that providing consumable reports would develop our brand, increase client loyalty and improve monthly recurring revenue.

Reach Reporting does just that. It allows us to highlight vital data while differentiating our company from our competitors. Best of all, I can create reports that are unique to our firm, then turn them into templates and use them for all my clients.

### The efficiency is incredible!

ProvenCFO has a hundred plus clients, and every client wants something different. That makes it difficult for us to standardize our process. With Reach, we're creating a process that allows us to take multiple clients, no matter the industry, the size, or accounting platform, and provide standardized reports.

With the flexibility of Reach Reporting, I can quickly build custom reports, templatize them, and apply that template to other companies, all without manually updating them every month.

Reach Reporting is the only solution that we've found in our price range that allows us to standardize our custom solutions. That's been critical in our growth. We select the data from our client's financials we know are essential and pull them into a standardized custom template that tells a financial story rather than displaying complex and confusing spreadsheets.



Our customization is now standardized, and that's winning us business by making our process more efficient.

### Easy to create a scalable foundation.

All the reporting solutions available seemed the same. Connect your accounting platform, minimal customization, and out came the same generic reports my competitors provided.

Another solution was to build customized reports in Excel, which I did. Creating these reports gave me the flexibility I needed, but it was painful to recreate and update each of my clients every month. Building this type of report was time-consuming and costly.

I wanted a solution that could be customized, scalable, affordable, and help improve our brand loyalty to our clients.

I researched Reach Reporting and discovered it was built on a spreadsheet platform. I was impressed! I thought, "Do they even know what they've built?" Reach Reporting allows me to create unique reports that clients appreciate and set my firm apart from others.

Reach Reporting does 90% of the report magic.

### A game changer for us.

Our monthly reports now provide visual charts and graphs that offer valuable insights to investors, business owners, and managers.

Reach Reporting removes the emotional grind of going through and producing the same financial reports manually for each client every month. I love that! I put in the work once and don't have to put in the grind ever again.

I don't know of anything, anywhere quite like this on any of the marketplaces.