



It saves a lot of time when onboarding clients.

A Reach Reporting Case Study.

The Company

KynLi Consulting specializes in strategic financial growth for marketing agencies and experts. They started off providing basic bookkeeping services and evolved to offer higher-level services such as fractional CFO services and strategic consulting. They aim to provide personalized and proactive assistance to their clients.

The Challenge

KynLi Consulting faced several pain points in their early stages. One challenge was that clients didn't read or understand their financial reports, which led to a lack of engagement. Another challenge was the time-consuming process of preparing and revising reports manually using Excel and other software. They needed a solution that would simplify report preparation, improve client understanding, and enhance overall efficiency.

The Solution

After exploring different software options, KynLi Consulting found Reach Reporting to be the ideal solution. The platform offered customizable templates and dashboards, automation features, and real-time updates. With Reach Reporting, KynLi Consulting was able to create visually appealing reports that broke down complex financial information into easily understandable metrics and projections.

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“I don't have to map accounts.”

Cameron Williams
Owner, KynLi Consulting

CUSTOMIZED REPORTS

Reach Reporting allowed KynLi Consulting to create customized reports that went beyond basic financials. They could provide metrics, projections, and visualizations that helped clients understand their financial situation and make informed decisions.

TIME SAVINGS

By using Reach Reporting's templates and automation features, KynLi Consulting saved considerable time in report preparation. They no longer had to manually update and revise reports, reducing the process from hours to minutes.

IMPROVED CLIENT ENGAGEMENT

The visually appealing and comprehensive reports generated by Reach Reporting enhanced client engagement. Clients could easily understand and interpret the financial information presented, leading to more meaningful discussions and better collaboration.

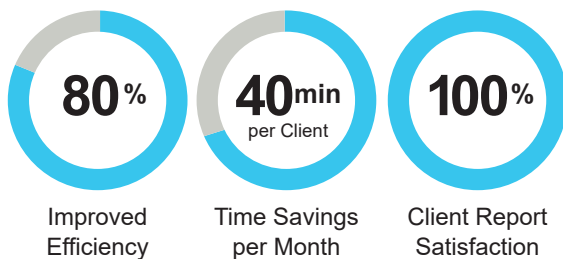
EFFICIENCY AND SCALABILITY

Reach Reporting provided a scalable solution for KynLi Consulting's growing client base. The platform allowed them to efficiently produce consistent reports for each client, eliminating the need for repetitive mapping and manual adjustments.

Overall, Reach Reporting had a significant positive impact on KynLi Consulting's business, improving their reporting capabilities, saving time, and enhancing client satisfaction.

The Summary

Reach Reporting transformed KynLi Consulting's reporting process, enabling them to provide comprehensive and visually appealing reports to their clients. The platform's automation and customization features saved them significant time and improved client engagement. KynLi Consulting was able to focus more on advising their clients and growing their business, thanks to the streamlined reporting provided by Reach Reporting.



Tell us about yourself, your business, some of the experiences that you had starting out and getting going as you've been growing your business?

"My name is Cameron Williams, owner of KynLi Consulting, where we focus on strategic financial growth from marketing agencies and experts. Our business has evolved as the industry and niche has changed and just the world in general. We had to change what we provided. We started off providing your basic bookkeeping services. As our clients began to make more and more money and we took on larger clients, we paid attention to the questions. They started asking for more help, like what to do for taxes and how to prepare, how or when to hire people. What does the paperwork look like for those things. How to make more



money and what to focus on. How to shorten their air cycle and all of those different things that are not just accounting. We started to advise on financial projections and consulting.

So that's why we switched from KynLi accounting to KynLi Consulting, because that's where we started to turn into consultants at a higher level and offer services like CFO-lite packages. So for us, we have evolved with it over time. We are now about to be celebrating year five in July (of year 2023). So we are grateful for that. If you would have asked me ten years ago, was I going to be a business owner, I would have laughed and said no, but it just happened the way it did for whatever reason. So we're just thankful to be able to be in business for five years and to be able to help people in a personalized and proactive manner."

What were some of the pain points that you experienced? What kind of painpoints have you seen for your clients?

"The first thing that I had to come to terms with, which all of my accounting buddies would laugh at, is that clients don't read their financials. I know that they get them because I emailed them over, but they weren't really reading them or understanding them. It was just papers with numbers and words. So I think one of the challenges that we had to overcome that we hoped and still do hope will separate us is we don't want to just give you numbers. We want to be able to break it down in a way that's easy for you to understand and comprehend. So

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Testimonial

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that was the biggest thing that we've had to do. That is one thing we have adapted to. Also we had to up our tech stack, we had to improve our systems and processes. We had to hire a team so that we can better serve clients in each capacity. And it's allowed us to continue to give that personalized one on one type of service that will be more powerful for each client of ours.

How much time were you spending just preparing reports? Even before you spent any time speaking with your clients?

"Each month it depends on the client. Let's say we're doing the full shebang. If you make one change to the financials, you've got to re-export and redo and rescind and all these other things. I was building everything out in Excel. You update one thing for your client and then later they call and say that they want to make additional changes. Now you have to redo it all again and redo formulas. A report on a perfect run can take maybe ten minutes, but when you start adding up all the revisions and adding them together it adds up quickly. So we're taking an hour, maybe two hours per report.

"The clients love it, they love the charts, the graphs that we're using, and it's just a better experience."

Even when we moved it to one of Reach Reporting's competitors, it was kind of the same thing where that initial setup took so long and you had to map everything manually. You had to change the name and then you had to save it all again. So like I said, time spent became a big emphasis for us. As we shifted from doing basic bookkeeping to providing that higher level of services I needed something that was going to automate things faster and have it still be the exact way I would do it manually."



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How was the the setup with Reach Reporting compared to the other software that you previously used?

"When I used the other software, one of the immediate things I disliked was I thought they were going to walk me through the software real quick and I'm going be able to take off and go. No, it's not like that. They said you have to take these three or four week classes, but the classes are only on a certain day at a certain time. So if you miss it that means I can't even be functional for at least three or four more weeks. And then it's kind of learning on your own and trying on your own. The whole mapping thing can get so repetitive, especially because I was running the same reports and so it was just real messy versus when I came over to Reach Reporting.

With Reach, I can explain to my account representative in an email what I needed or get on a call and show them what I currently have going on, explain what I'm trying to do and what I want to see. And since they know the product they get right back to me and usually say, "Yes, we can do that. Matter of fact, I've got a template here. Let me show you."

So as we were exploring Reach, I had my team on the call and we our account representative walked us through all of the features and we realized that we can change our entire business with Reach. Just like that. Bam. On the call I am asking things that would be important for us to do and they easily shows us with just a few clicks and just like that they are done and it is all setup in our account.

So the onboarding, if you want to call it that, took me maybe a week, but let's say two weeks to really learn it. I don't feel like there's been any real learning curve, which is impressive. Reach really helped me hit the

"Reach really helped me hit the ground running."

Testimonial

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ground running because I did this during the Christmas break. I told my team that we were starting off in January and so I needed this to be up and running. So we were able to do that.

The clients love it, they love the charts, the graphs that we're using, and it's just a better experience for them because we're not just giving them a QuickBooks version of financials. Now they have reports, they have metrics, they have projections, and for us it's automatically updated once we refresh in QuickBooks. So it just made things a lot smoother and easier for us.

It saves a lot of time, especially when we're onboarding a new client. I don't have to map accounts. All I have to do is take my template that I've already built and perfected it, just connect it to QuickBooks and it automatically will feed in everything in the way that I want. So it's been a

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great thing for me. That team voted for it as we all watched the demo together. So this was all their vote as well. So they love what it provides to our clients.

Another thing that bothered me with previous software. They didn't really have someone dedicated to me that could help me. I always had to go through someone.

With Reach, I wouldn't say that a representative is always going to get back to me in minutes, but at least to me it feels like within like an hour they respond back and either has a solution or wants to get on a quick Zoom call for a few minutes and go over whatever is needed or send us things. For me that was a big thing.

I'm very big on having that personalized person that kinda knows my account in and out because that's the same thing we try to do for our clients. So I think that in and of itself allowed us to want to join because



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we knew if we had a question and I just need to shoot an email to Reach and they are going to know my stuff and be able to go in.

That was a big win for Reach and for us that I was going to have a dedicated person that was going to look out for me and my best interest to keep whatever we needed efficient, quick and make us look really good to our people."

What are some things that you'd like Reach Reporting to add or improve upon?

"I think Reach did such a great job on the original demo side, and it's showing me the ins and outs. After we paid, we did our first official meeting with Reach's chief architect. He pretty much built everything right. So I don't really have anything to improve upon. I personally think my style is unique. I'm sure at the outside you would say, nah, it's pretty standard, but I feel differently because we are unique in who we serve.

Reach pretty much does everything that we want. I haven't seen a need to add to it. For me it works perfectly fine in the manner that we need and we use it all the time. I use it to make Loom videos and comments. That's what I'm sending to the client. That's why we're sending them projections out pretty close like three or four days before the end of the month. That's where I'm going. So I really feel very comfortable with it and I don't really have any feedback. If anything, I probably don't know the full utilization of it to probably even capitalize on the whole entire thing."

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Visit us at REACHREPORTING.COM or call

(877) 467-7637