Reports that Differentiate.

A Reach Reporting Case Study

Clients are more engaged in their financials because of Reach Reporting.

Pam Jordan
CEO Pivot Business Group

The Company

Pivot Business Group's team is committed to help clients get their business to the next level through a profit analysis they call 'the Pivot Process'. They offer both Advisory and Fractional CFO services with a focus on cash flow, profit, sales, teams, and systems.

The Challenge

There was a disconnect with Pivot's clients at the end of each month. Pivot would send the P&L and a balance sheet but the client never looked at it because they didn't understand the rows and columns of numbers. Their clients were not utilizing the vital financial information they were giving them. Pam was looking for a tool that would display the clients financial information in a way they would actually look at, understand, and use.

The Solution

By simply connecting QBO with Reach Reporting, Pivot Business Group was able to improve their deliverables by providing beautiful, simple reports that are both easy to understand and professional. Pivot's clients went from receiving reports that they didn't understand, or understood very little of, to understanding them, and having the confidence to ask questions about their financials.

INCREASED SALES

Pivot Business Group sales increased when they began showing clients and potential clients samples of professional reports they receive with Reach Reporting.

INTUITIVE AND SUPPORTED

Pivot's team did a short demo, then found the implementation surprisingly intuitive. When they did have a question, the response from Reach's support was very timely and helpful. There was absolutely no downtime.

IMPROVED CLIENTS UNDERSTANDING

Pivot Business Group was able to offer reports their clients were excited to receive. Clients were opening their emails and engaged with their finances because they finally comprehended the numbers and asked questions.

TO LEARN MORE
Visit us at REACHREPORTING.COM or call

(877) 467-7637

Testimonial

A Reach Reporting Case Study

REACHREPORTING

Improved reporting and client understanding

Pam Jordan, CEO of Pivot Business Group

PIVOT BUSINESS GROUP

I've spent over 15 years working in corporate finance and am passionate about helping others reach their desired business destination. I have repeatedly seen that most clients don't utilize the P&L and balance sheet their accountants give them. For most business owners, the rows and columns are overwhelming and confusing.

When my clients did not understand their financials, I noticed that they continued to do business as usual rather than making decisions that would improve their business. I knew Pivot Business Group had to help our clients engage with their financials while differentiating our deliverables.

I heard about Reach Reporting from one of my CFO's who uses the software. She showed me the reports Reach Reporting could automate, and I immediately saw the value in the visualization, layout, and simple implementation. Better yet, I could customize any report or build anything I wanted from scratch in their spreadsheet back end!

We hit the ground running.

I set up a 30-minute demo for my team with Reach Reporting. The demo was a great jumpstart. We learned how easy it is to connect a client, automate a report, and turn our custom reports into shared templates so our entire team can access them.

We were pleasantly surprised by how easy the software was to use and figure out. When we did come across a question we needed help with, we hopped on a quick zoom call, and a member of their support team helped us accomplish what we needed to do.

It's just so easy to use.

It's nice to be able to go into Reach, make sure it's synced, pull up our monthly CFO report or quarterly report, and have it ready to roll. Real-time QuickBooks syncing benefits both me and my client. When I'm on a call, I'm working with the most up-to-date data. I love having the capability to automate a report on the fly in response to their needs and questions and share it with them quickly.

We started using Reach Reporting for all of our bookkeeping and CFO clients. Now our business owners can look at a report and understand it!

As accountants, we are used to looking at rows and columns of numbers, but our clients are not. Most accountants see spreadsheets as simple and organized, while most clients do not. Reach Reporting is the tool that helps my clients see and understands their most important financial information in a report that is beautifully simple. It has been a game-changer.

We have not increased our pricing with our current clients because Reach's value pricing model was affordable and valuable enough for us to absorb that initially. Once our clients see the reports we provide with Reach Reporting, they request them for all companies. I know what you are thinking time-wise; how can we do that? With Reach, we save time running reports.

Reach helps close potential clients.

With new clients, we use Reach Reporting as part of our sales process. We give them a sample of what their data will look like and how easy it is to understand. They see for themselves the value in the reports.

We account for the monthly Reach Reporting subscription fee as a fixed cost and pass it along to our new clients, which is minimal for the robust deliverables they will receive.

The most significant value I've found is how happy my customers are to get monthly reports that they can look at and understand. Our clients have changed from hardly looking at their reports to engaging insightfully with them.

Our clients are confident in their financial understanding of their business to make decisions that will help them reach their business destination.