



Client Ranking

Strategic Data Analytics
User-friendly Dashboards
Data-driven Decisions

TECHNOLOGY & DATA

click to learn more!

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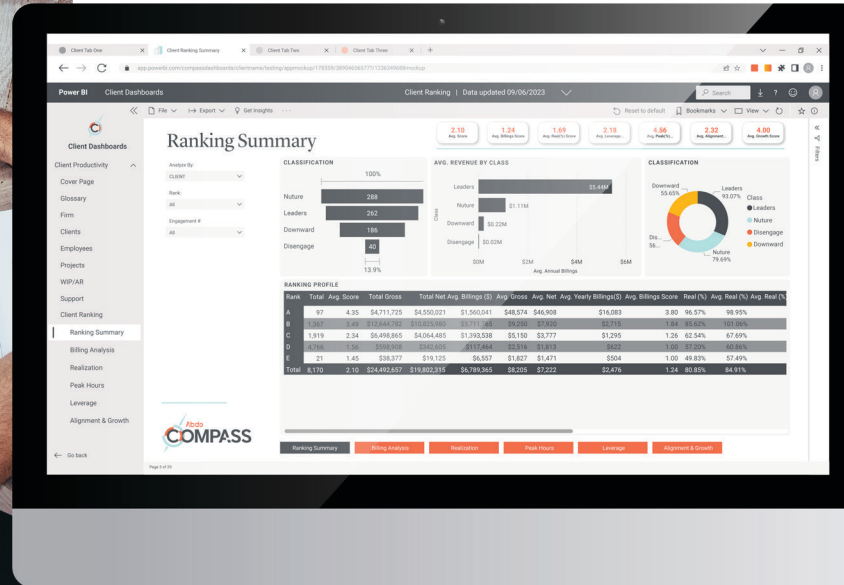
Identify your top clients & ease capacity through client ranking

Compass is an interactive, comprehensive, and real-time reporting tool that provides firms with actionable and timely information to monitor the performance of and make decisions for their business. Our new Client Ranking Score allows firms to go even further.

We all know how difficult it can be to ensure we're spending our time where it will make the most impact for the firm. With the Client Ranking feature, you can compare all of your clients and client groups equally, making it easy to identify your top clients and which clients to part ways with.

“ Our Client Ranking for Compass helps uncover the hidden potential in your client list: our data analytics solution offers CPA firms a comprehensive view of their entire client portfolio. By identifying and ranking your top clients, we enable your staff to focus their attention on the relationships that matter most. As a result, you can increase customer satisfaction, optimize resource allocation, and drive revenue growth – all with the power of data-driven insights. ”

STEVE MCDONALD, CPA
Managing Partner | Abdo



OUTCOMES

Our dashboards help simplify your client data and track the information that matters most in your decision-making.

- ✓ Drive revenue growth
- ✓ Optimize resources
- ✓ Deliver a better client experience
- ✓ Increase employee satisfaction

Interested in learning more?

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