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## Firms Better Advise Business Clients

Nov. 06, 2012

At its annual user conference in Sand Diego, CCH today announced it is launching a new ProSystem *fx* Client Intelligence solution for automating the continual analysis of clients' business performance. Now, professionals will have the ability to create a firm-wide business intelligence system focused on client results that will also seamlessly integrate with [ProSystem \*fx\* Engagement](#). CCH, a Wolters Kluwer business is a leading global provider of tax, accounting and audit information, software and services ([CCHGroup.com](#)).

Through an expanded partnership with financial and business software provider [iLumen](#), ProSystem *fx* Client Intelligence identifies hidden opportunities for business clients by generating real-time, value-added analysis. Clear, detailed solution reports strengthen communications between firms and clients as well as promote greater collaboration on a wider variety of analytics – boosting retention and solidifying CPAs as trusted advisors.

“ProSystem *fx* Client Intelligence allows professionals to perform extensive analysis of their client's financial data in a way they've never been able to before, providing a competitive edge for firms to capture, retain and advance business,” said Mike Ritchie, CCH Director of Product Management, Accounting, Audit & Workflow Solutions. “With growing industry trends for specialized client analysis, incorporating iLumen's financial analytics and business intelligence tools will allow users to gain deeper insight into their client's business performance – increasing the value of what firms can offer their clients.”

## Business Intelligence Advantage for Firms

With ProSystem *fx* Client Intelligence, a client's financial data is extracted from

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- Automatically syncs client data from ProSystem *fx* Engagement in a few simple steps;
- Leverages existing ProSystem *fx* Engagement groupings to map client data into industry standard templates;
- Customizes trend reports and analytical presentations for a client's specific industry;
- Prepares customized industry analysis and comparative benchmark reports for determining how clients stack-up to peers or other clients of the firm;
- Provides value-added deliverables to differentiate audit and advisory presentations; and
- Enables the ability to easily enter key metric and non-financial data when needed as well as allowing imports from other accounting systems.

### Seamless Integration with **ProSystem *fx* Engagement**

ProSystem *fx* Client Intelligence is incorporated into the File Room window of ProSystem *fx* Engagement – conveniently located on the Tools tab. It's also featured on the Tools tab of Engagement's Binder Windows. Users can easily send data from their Engagement binders into Client Intelligence.

Advisory

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