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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

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

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