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Apr. 08, 2013

2013 Innovation Award Nominee:

ProSystem *fx* Client Intelligence

www.CCHGroup.com

ProSystem *fx* Client Intelligence is a cloud-based analytical platform that allows a CPA firm to perform extensive analysis of their client's financial data, providing deeper insight into their financial condition, trends, and industry benchmarks, and adding value to firm/client relationships. Client Intelligence is much more than a reporting tool as it not only provides insight into current and potential client financial issues, but can also serve as a marketing tool to demonstrate expertise and value.

Through a new partnership with business intelligence solutions provider iLumen, Client Intelligence creates a firm-wide client business intelligence system that is fully integrated with CCH's ProSystem *fx* Engagement. Data is seamlessly extracted from Engagement into a web-based analytics platform that enables special solution features that help firms differentiate themselves from competitors:

- Automatically generates analytical and graphical presentations to share with clients and prospects;
- Prepares client dashboards for monitoring key performance trends and a client's overall business health;
- Allows for collection of industry specific, non-financial data for robust analysis;
- Customizes trend reports and analytical presentations for a client's specific industry;

- Prepares customized industry analysis and comparative benchmark reports for

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While other products in the marketplace provide reports and analysis, Client Intelligence truly stands above the crowd – providing professionals the unique ability to perform an unlimited number of custom analyses of their client data. Firms can easily identify whether clients are meeting very specific criteria as well as compare groups of clients against industry standards.

The product also allows for CPAs to directly enter financial statements of prospects, enabling company specific comparative peer group analysis and trend reports that can be incorporated into prospect presentations for powerful competitive differentiation. Finally, because the service is cloud-based, CPAs have anytime, anywhere access to the information and the comparative data sets.

Click here to see an [in-progress list of nominees](#) for the 2013 Innovation Awards.

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