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tools to work together remotely.

Apr. 01, 2020



COVID-19 has suddenly changed the way we live and work. Professionals across the country have adapted by bringing their hardware home, clearing a space to work and adjusting their routines. But what about their clients who aren't as tech savvy and struggle online?

"For the last several years, the trend has been steadily moving from in-person client meetings toward an all-online experience," said Chris Farrell, CEO of Liscio. Many firms were waiting for the right time to deploy an online client-experience platform and COVID-19 just changed the timetable. The challenge now is to help firms make it as easy as possible for their most vulnerable clients to be successful working with them online."

Asking clients to embrace a clunky portal or juggle email and multiple add-on systems is difficult enough in ideal circumstances. Most firms see portal adoption rates less than 30%. The key to high adoption is to keep the software as simple as possible and to offer tech support to end users. Liscio does both.

Key Platform Capabilities

- **Real-Time Messaging:** Firms and their invited clients are the only people who can

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- **Secure File Sharing:** Liscio's secure platform allows firms and clients to share documents from anywhere. Liscio also provides firms with a desktop app that allows them to print files directly to Liscio from any software package.
- **FirmView:** Liscio allows team members to stay up-to-the-minute on all client communication and outstanding tasks, making it easy for teammates to be proactive and step in to cover when needed.
- **Web and Mobile Applications:** Clients expect modern firms to be available when they need them. Just about everything that used to be done in person is available through your browser and the Liscio Mobile App.
- **Customer Support:** Liscio offers complimentary technical support to firms and their clients.

## **Customer Validation**

"All our staff has access to see what communications have occurred with clients. It was smooth during tax season — when a client called to see if we received something, anyone answering the phone could help them." Tabitha Swanson, President of The Swanson Group LLC

"Everything is tied together in one nice little bundle inside Liscio." Karla Geldermacher, Owner of Altitude Financial Services

## **Remote Client Experience is the New Normal**

Many clients prefer an all-remote client experience while others will need an all-remote client experience from time to time. Liscio's is the market leader and complements existing accounting firm infrastructure such as practice management systems, internal messaging tools, CRM, and more. Instead of requiring firms to rip

and replace existing core back-office systems, Liscio fits seamlessly into any tech

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