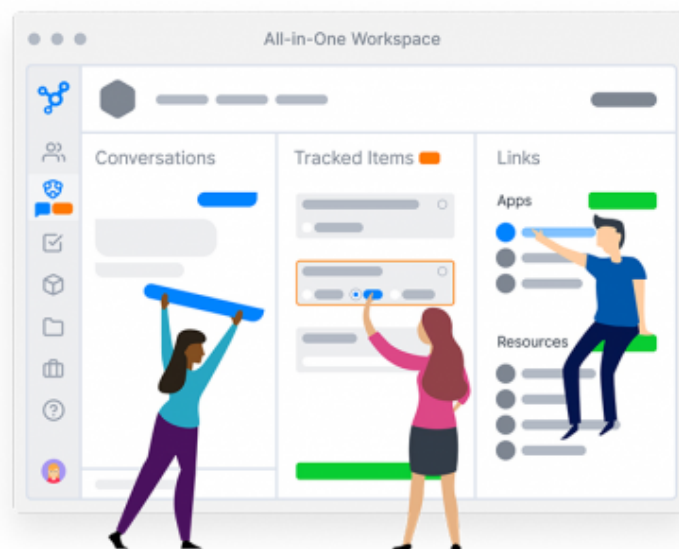


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workflows are not limited to just their staff. To deliver frictionless workflow, the Client Hub team spent a lot of time studying where the workflow bottlenecks occur.

Sep. 30, 2020



Client Hub has announced the launch of new internal new workflow management capabilities. Now, cloud accounting professionals can leverage Client Hub's streamlined all-in-one platform that combines internal workflow management with external client collaboration — saving time and reducing subscription costs.

A key insight behind Client Hub is that a cloud accounting firm's client service workflows are not limited to just their staff. To deliver frictionless workflow, the Client Hub team spent a lot of time studying where the workflow bottlenecks occur. Bottlenecks typically do not occur "while doing the work" or even while "moving

work through your team”. It is typically because of “waiting for clients” for

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turnaround than waiting for clients to respond to emails, which land in cluttered email inboxes.

“As a practitioner, I found that there were two categories of apps for accounting firms: internal workflow apps and client portal apps,” said Judie McCarthy, co-Founder of Client Hub. “When we started Client Hub, we had a vision to unify these two areas into a single streamlined platform and now, we are excited to have arrived at that solution.”

Client Hub was selected for the AICPA Startup Accelerator program in 2019 for its client collaboration platform. From there, Client Hub has continued to expand capabilities, including native cloud-based File Management, a unique QuickBooks integration that automatically sends client unclassified expenses, and now internal workflow management.

“For a small cloud accounting firm, Client Hub is now the platform of choice — instead of stitching together multiple apps to create an expensive and complicated tech stack, they can run their practice completely from Client Hub” says Richard Roppa-Roberts, founder of Not the Only One Roundtable, a network of QuickBooks ProAdvisors. “Our group members have consistently remarked how Client Hub saves them hours of time.”

Accounting

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