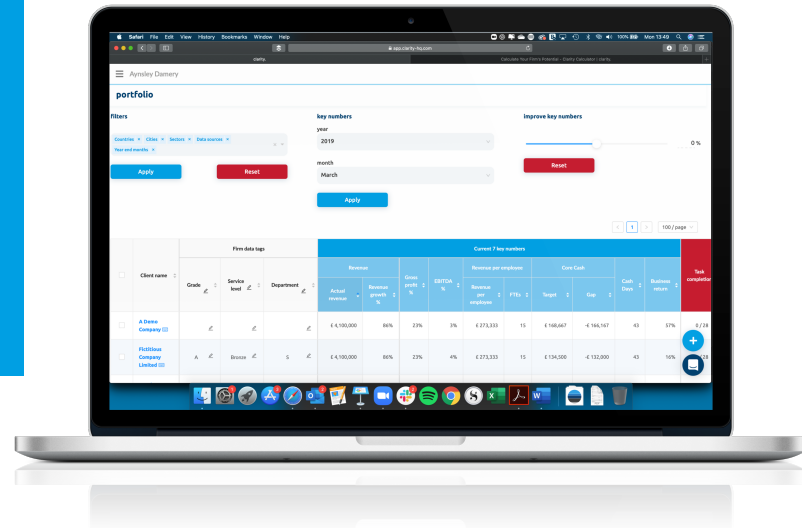


DATASHEET

The complete business advisory platform



Benefits

1 Complexity made simple
Clarity takes your clients' financial information and makes it easier to understand and drive insights, outputs, and the right strategic course of action

2 Drive your firm's success
Introduce or scale your advisory services, increase client retention, engage the team and increase recurring revenue and profits for your firm

3 Save time to focus on your own strategy
Clarity automates your advisory, reporting and insights workflow making it faster and easier to deliver, whilst getting the team involved, so that you can focus on your firm's strategic goals

4 Greater value for clients
Tell the right story with confidence and enable more of your clients to access valuable business advisory services at a price they can afford to pay

Clarity® is the complete business advisory platform that can help you introduce and create a profitable, repeatable and scalable business advisory service for your firm.

Our multi-award winning solution creates an additional revenue stream in excess of 40% for you, whilst increasing your bottom-line profitability by 125%.

In the past, business advisory hasn't properly leveraged the right combination of people, process and technology. It has been heavily reliant on partners or managers to deliver, there isn't enough time, it's difficult to scale and only the top x% of clients can typically afford.

Using Clarity adds significant value to your small business clients, at a price they'd love to pay.

"If you think that Clarity is just a piece of software, you're missing the point. It's a mindset, a different way of doing business and a shift in the way we talk about our firm to prospects and clients"

Graeme Tennick, Tennick Accountants - Best Digital Accountants 2020

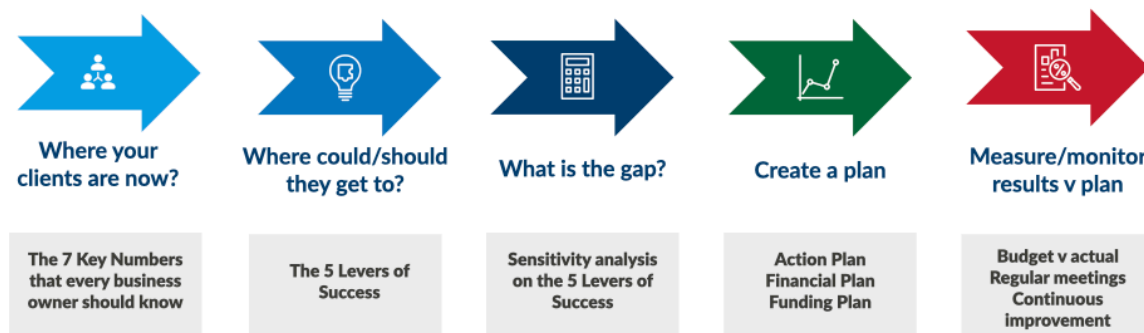


Our solution

Clarity combines the power of:

- a technology-led platform - to do the heavy lifting;
- hi-impact systems and processes - to get the same great result every time for the firm and client;
- education, implementation and accountability programmes- beyond advisory, helping you and your firm; and
- member events and a vibrant community - empowering your team, firm and clients to achieve success.

Business advisory - made simple



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Features

- Know where your clients are with the 7 Key Numbers every business owner needs to know
- Collaborate with your clients on their 7 Key Numbers and the 5 Levers of Success, to help them understand what's possible and see the total effect of any changes on their profit and cash position
- Create action plan, growth and funding plans with your client, together with suggested tasks to enable your team drive accountability and help clients achieve their goals
- Learn and access systems, processes, template emails, agendas and checklists to build your ideal firm and deliver success to your clients
- Verify essential business documents and assets in clients' own data room ready for when they require borrowing, funding or exit
- Powerful insights all on one screen. Monitor key metrics, sort clients to segment them, filter clients to benchmark them and improve clients' numbers all at once to see what's possible for the firm
- Positions the implementation of other (reporting) apps to create the bigger picture and improve adoption
- Create a financial plan for all of your clients in minutes
- Help your clients get their business funded with our 3 step funding process and direct integration to Capitalise®
- Track budgets versus actuals to help clients continuously improve
- Education to upskill accountants is built into the system, to help your teams develop
- World class member success team and support to help your firm beyond advisory and access to a vibrant community

"In a year that has seen several newcomers disrupt the established order, Clarity swept past previous winners Float and Fluidly to win Forecasting, Planning & Analysis Software of the Year. The software was equally popular among business and practice users and was praised for its ease of use and value for money."

AccountingWeb.co.uk, Accounting Excellence Awards