

Partner Solutions



Leverage our Expertise, Advanced Tools, and Extensive Client Network to Grow Your Practice

For over a decade, Analytix Solutions has extended its financial and accounting expertise, advanced technological infrastructure, and affordable cost structure to CPA firms, bookkeeping companies, CFOs, etc., in the form of business partnerships.

Strategic Business Partnership

Value-Added Capabilities to Differentiate your Practice

By tapping into Analytix leading-edge tools, robust service offerings and industry know-how, our partners are able to dramatically improve their business capabilities.

Whether partners outsource their more tactical accounting tasks to our team of professionals, or choose to brand our services as their own, Analytix offers a combination of quality and cost advantage through its unique offshore model.

- **Diverse range of services:** Bookkeeping, Data Automation & Integration, Business Analysis, Part-time CFO.
- **Scalability:** Based on unique needs, Analytix can serve as an existing staff of Accountants during peak periods or provide high-level reporting to partner clients.
- **Technological capabilities:** Analytix's secure web portal allows partners and their clients 24/7 access to all financial documents.
- **Process automation:** Integrate Analytix proven automation systems into your clients processes.

Outsource your back-office tasks

Partner firms can delegate their administrative accounting and bookkeeping tasks to Analytix so that they can focus more time on the higher-profit margin services at which they excel. We also work with existing bookkeeping and Accounting staff to alleviate repetitive, tedious work.

Benefits

- Increase profitability by focusing on higher revenue generating services
- Maximize efficiency and expedite client services with proven, automated processes
- Mitigate the risks associated with manual work
- Develop new client business with enhanced offerings and tools
- Dramatically improve technology capabilities with little to no investment
- Offer customized financial and operating reports based on client needs
- Organized, "clean" books for assurance services
- Increase the flow of qualified leads through cross-referrals

Capabilities Overview

Electronic document management system

- Attach source documents to transactions, ex: PDF of an invoice to a QuickBooks journal entry.
- Document library for filing non-transaction documents.
- Remotely access client files 24/7 for designated, approved staff members.

Custom financial and operational reports

- Generated on-demand to aid discussion and lend insight on client business planning.
- Application writing for automating the daily activities unique to partners and their clients.

Data integration of client systems

- Connect POS / Payroll / Accounting / Time and Billing / Expense Reports / Client Database systems.

Web portal expedites delivery times and ensures accuracy

Our secure web portal offers real-time access to the critical financial data for each Analytix service provided in one, centralized location.

With robust reporting capabilities and document management tools, both you and your clients can easily review revenues, cash flow, and other financial information at any time.

- Integrates with third party accounting applications, such as Quickbooks.
- Automated data validation and quality checks allow us to identify errors, generate notifications, and reconcile discrepancies as they occur.
- Eliminates the need for write-ups with prepared financial statements.
- Data security guaranteed through SSAE16 standards and private hosting in our local data center.

Ways partners can work with us

Private label engagement: All project deliverables are white labeled so that partners can share our work and tools without disclosing their engagement with Analytix. Our data portal is branded with partner logos and business information.

Collaborative engagement: Partners remain in a client-facing role at the forefront of all services executed, but their clients are aware of our collaboration as an outsourced service provider.

Direct-Client engagement: Partners send their clients to work directly with us. While Analytix Account Managers facilitate all projects from start to finish, we consult with partners on an ongoing basis to ensure deliverables align with the unique needs of their client.

Referral-Based Partnership

Analytix Solutions has developed a nuanced understanding of its clients needs. While we specialize in accounting services and financial record preparation, we do not offer the core CPA services that many of our small to mid-sized business clients require.

Together, Analytix and CPAs are in an invaluable position to cross-refer new business prospects. This means less expense pursuing new leads and more time converting sales.

Analytix to CPA Partners – Having the financial pulse and trusting ear of our clients allows us to refer them to the firms we know will best serve their business. Leverage our nation-wide network of authentic client relationships to bypass business development costs with pre-qualified leads that seek your services and trust our record of success.

CPA Partner to Analytix – Benefit from more efficient and profitable client engagements when we perform the bookkeeping or other back-office tasks for your clients.

- All source documents are electronically available for review on our secure web portal, eliminating the need to visit client's offices.
- Profit and loss statements and all-related records are reconciled, eliminating the need for "write-up" work.
- Dramatically improve tax preparation efficiency and ensure data accuracy.

Industry-Specific Partner Solutions

Analytix understands that every industry is different. That's why we developed a solution that enables businesses – from veterinary clinics to restaurants – to seamlessly manage their unique financial and accounting operations on one, robust platform. CPAs serving industry-specific clients can partner with us to develop industry tailored solutions that are unlike any other, giving firms a competitive advantage in their target market vertical.

**Call us today for a FREE analysis
of your accounting system
(\$1000 value)**

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About Analytix Solutions

Businesses who are positioned for growth turn to Analytix Solutions for scalable, single source business solutions. We provide small to mid-sized businesses with a full range of accounting services, ranging from bookkeeping to CFO services, in addition to accounting systems automation and integration.