# ABLE

# CLIENT EXPERIENCE MANAGEMENT FOR ACCOUNTANTS

**Focus on actively engaging your key relationships and watch profits soar!**

Built on 20+ years of experience working with CPAs, ABLE combines a series of proven best practices from the most successful firms into a systemic program designed to fuel growth and development at your firm.

ABLE helps users efficiently focus their business development (BD) activities to achieve maximum results – a critical attribute given the limited number of non-charge hours practitioners actually have to invest in BD.

## With ABLE, you can:

- Easily manage your most important relationships via your **CRoPs Tiles™**;
- View your **current pipeline** of pending new business;
- Develop your **personal brand** by easily providing timely and relevant information to your constituents;
- Position yourself as a **Thought Leader** is your specific area of practice;
- Effectively **cross-sell** more advisory services within key relationships;
- **Measure the loyalty** of your most important clients, and calculate their Net Promoter Score™
- Generate a vibrant **network of active referral partners**;
- Effectively **position** yourself in front of a defined set of top prospects;
- Utilize the built-in **CRM capabilities** to practice more synergistically with other members of your firm.

## RECOGNIZED BY ACCOUNTING TODAY AS ONE OF THE PROFESSION'S "TOP NEW PRODUCTS"

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|---|---|
| **Investment:** | $6,500/Year (Up to 10 Users) |
| **Additional Users:** | $200 (11-50 Users) $100 (51+ users) |
| **One Time Setup:** | $1,995 |

*"Our partner's reaction once we implemented ABLE was 'Why didn't we do this yesterday?' Using ABLE has been a great experience for our firm, and the resulting accountability has allowed us to efficiently move new business opportunities through our sales pipeline!"*

**JoLayna Arndt**
**Marketing Director**
**JLK Rosenberger LLP CPAs**

| | ABLE | CCH | ContactEase | HubSpot Marketing Pro | iChannel | Microsoft Dynamics 365 | Nutshell | ResultsCRM | SalesForce | SugarCRM | Templeton Solutions | Thomson Reuters | ZoHo CRM+ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Pipeline/Funnel Reporting | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● |
| Opportunity Management | ● | ● | ● | ● | | ● | ● | ● | ● | ● | ● | ● | ● |
| Custom Tags/Fields | ● | ● | ● | ● | ● | ● | | | ● | ● | ● | | ● |
| Web-based Platform- *Nothing to download* | ● | ● | | ● | ● | ● | ● | | ● | ● | ● | | ● |
| Personalized email capabilities | ● | | ● | ● | | ● | | | ● | ● | ● | ● | ● |
| Content Library & Distribution | ● | | | | | ● | | | ● | | ● | | |
| Live Support | ● | | | ● | | | ● | ● | | ● | | | |
| User Accountability Manager | ● | ● | | | ● | | ● | ● | ● | | | ● | ● |
| Shared user activity feed | ● | | | | ● | ● | ● | ● | ● | ● | | | ● |
| Easy identification of most important relationships | ● | | | | | | | | | | | ● | |
| User Community | ● | | ● | ● | ● | ● | ● | | ● | ● | ● | | ● |
| Personalized Onboarding | ● | | ● | | | | | | | | | | |
| Client/Customer History | ● | ● | ● | ● | ● | | ● | ● | ● | ● | | ● | ● |
| 60-Day Money Back Guarantee | ● | | | | | | | | | | | | |
| All customers utilize the same version of platform | ● | | | | | | | ● | | | | | |
| Turn-key solution with minimal configuration | ● | | | | | | | | | | | | |
| Personalized Adoption & Engagement Support | ● | | | | | | | | | | | | |
| Easy User Interface | ● | | | | | | | | | | | | |
| Designed specifically for CPA firms | ● | | | | | | | | | | | | |