

# How Genieaz Acc Helped Improve Customer Experience of Multiple Accountancy Firms

## Introduction

Efficient invoice processing is crucial for any business, especially for an accounting/ book-keeping firm that manages clients from diverse industries like manufacturing and construction. Apart from serving the core business and operations it's crucial for any business to retain the customers and to increase the customer base. Improved customer experience will result in an increase in customer retention and increase of new customer onboarding due to recommendations.



## The Challenge



The systems similar to Genieaz Acc in the markets help solving companies in serving their core business and operation but most of them fail to address the fact that the end customer experience not just relies on what output the customer receives, but how service requests are made and how the final service reports or outputs are delivered to the customers.

Most of the time, customers send invoices and other documents to the accountancy service providers using various channels such as emails, shared drives and physical drives in an ad-hoc ways. Both clients and service providers struggle to keep track of documents especially when there are multiple versions of same documents.

## The Solution



Genieaz Acc provides a comprehensive solution where both clients as well as service providers can communicate seamlessly. Service provider area of the Genieaz Acc includes portal to manage multiple clients and configure their preferred channels such as Google Drive, Dropbox, One Drive as plugins and ability to integrate with solutions like Zapier to connect with any popular accounting software like Xero, QuickBooks, Kashflow, Sage.

Every client company is provided with dedicated email account to transfer purchases invoices automatically. The clients just have to configure the email under the vendors system, all the other steps will be automatically handled by Genieaz Acc. This is handy when it comes to recurring purchase invoices. Additionally, clients can forward any emails to the dedicated email id as they receive, No additional work is required from the service providers side and its automatically visible inside Genieaz Acc system.

Both clients and service providers portal are equipped with “Upload Area” with a comprehensive set of commonly required features when uploading documents such as reordering, batch uploading and simple file uploading.

The Genieaz Acc includes an integrated chat system where clients and service providers can communicate and share documents seamlessly.

The above mentioned solution is supplemented with easy to use mobile app available in Google Play store as well as Apple app store, allowing clients to upload documents on the go. Making it easier for a client to upload invoices as they spend in the store.

## Results

The case study is done with our newly onboarded accountancy firms. Following metrics are used to validate how customer experience has improved by using Genieaz Acc.

Service providers, Client’s retention rate increased by 16.7% as more and more clients were onboarded to the Genieaz Acc.

Out of the new clients started using the service providers services, more than 35% of them came by recommendation from another client out of them 78% were using Genieaz Acc.

## Conclusion

The product helped the accounting service providing companies to overcome the challenges it faced in managing multiple clients and operational costs. As a result, the accounting firm was able to improve its competitiveness in the market and focus on business growth.

Overall, the implementation of AIZENIT’s Genieaz Acc product was a win-win situation for the accounting firm and its clients, and we highly recommend it to any company looking to Improve Customer Experience.