

# Client Onboarding App

## Client Profile

Renowned strategic tax planning, accounting and business consulting CPA Firm in USA

## Challenge

The CPA firm was looking for a reliable solution to digitize internal processes. The business wanted a right fit technology that could ease-out their internal operational workflow to enable smooth practice management and offer smooth onboarding of new customers.

The Customer's legacy systems posed operational challenges. These systems provided data entry in two disparate environments without any approval/validation mechanism in place, often resulting in extra validation effort and time-lapse.

## Solution

iLeap partnered with the firm to build a custom CPA Client Onboarding App that seamlessly integrated with their existing legacy suite of practice management applications.



A unified Client Onboarding App was developed that enabled

1. Efficient Pipeline and Prospect Data Management
2. Automated New Client On-boarding
3. Integration with Professional Firm Software
4. Reduction in operational costs and time
5. Enhanced Client Onboarding Experience

## Benefits



**SEAMLESS PROCESS  
AUTOMATION**



**DIGITIZED CLIENT  
ONBOARDING**



**EASY INTEGRATION  
TO CORE SYSTEMS**



**UNIFIED VISUAL  
INTERFACE**



**SUPERIOR TEAM  
COLLABORATION**



**IMPROVED INTERNAL  
PRODUCTIVITY**



**BETTER DEPARTMENTAL  
COLLABORATION**



**ENHANCED  
CUSTOMER EXPERIENCE**



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