

IRIS | Accountant Go

KEY BENEFITS

▶ **Improved communication**

Accountant Go features app messaging that allows accountants to send push notifications to clients reminding them of key events, such as an upcoming tax deadline. The app messaging can form the cornerstone of marketing campaigns promoting additional services to clients.

▶ **Enhanced collaboration**

Accountant Go enables greater collaboration between accountants and their clients by allowing them to easily share and receive information. Accountants can share documents, digital forms and provide a number of calculators for clients to use.

▶ **Increased connectivity**

Accountant Go connects to a range of apps such as IRIS Snap for Receipt Capture, IRIS OpenSpace for document sharing and approval, KashFlow Go for mobile invoicing and payments, and IRIS Insight for forecasting and management reporting. Configure what apps, websites and documents your clients can see using the Accountant Go Portal.



Accountant Go

A practice-branded mobile app designed for accountants to engage and communicate with their clients.

Overview

Accountant Go provides an single portal to access information and digital tools. The app enables accountants to provide a wide range of services and relevant client information, including data from IRIS practice suite, to their client's mobile device, whilst being able to fully customise the app appearance using a self-service web portal.

Challenge

Most firms recognise client relationship management as key to a successful practice. Exchanging information in a timely manner allows accountants to plan their activities leading to better job management, on time delivery and delighted customers. Intermittent communications can have the opposite effect.

Client expectations are shifting and, as a result, accountancy practices must rejuvenate their client experience as they progress on their digital journey. Digital experiences, such as mobile applications, bring together customer data, digital experience, and personalisation to create an efficient, modern way to manage interactions with clients.

Solution

Accountant Go app is ideal for accountants in practice to provide for their clients who expect primary access through their mobile phone at any time. Addressing the accountants need to reduce the amount of time spent by staff answering customer's questions about basic information requests. So that they can remain competitive and profitable, as well as retaining clients with an improved customer service.

