

Building relationships with our accounting clients requires trust, rapport and an atmosphere for open dialogue. Many accounting firms use a checklist to prepare for client meetings and to facilitate information exchange. Here are some questions that many accountants who are clients of ProfitCents have found helpful when interacting with their business clients.



LIQUIDITY

- Do you currently have the resources to grow your business without experiencing cash shortages?
- Do you annually budget for your expected cash requirements?



PROFITS AND PROFIT MARGIN

- Do you know your Gross Margin, and is it comparable to your peers?
- Does your compensation system encourage increased productivity, revenue and gross profit?



SALES

- Have you established sales goals for this year? Next year? Can you describe your ideal customer?



BORROWING

- In regards to your banking relationship, are there any debt covenants or other issues that you have a hard time fulfilling? Are you able to obtain reasonable terms from suppliers?



ASSET MANAGEMENT

- Do you currently estimate the return on investment and set targets before purchasing new equipment, hiring new employees or adding new business lines?



EMPLOYEES

- Could you increase production without dramatically altering your workforce?
- Do you have a profile for an ideal candidate for each job in your company?

Benefits of ProfitCents

Better understanding
client challenges

Highlight opportunities
to cross-sell services

Generate insight into
possible demand for
your advisory services
you do not yet offer

About ProfitCents:

ProfitCents is a financial information company that provides accounting, risk management, financial analysis and business valuation technology solutions to financial services firms and financial institutions. Our mission is to make complicated financial information easier to understand and analyze. Thousands of accounting firms, banks, credit unions, valuation firms and private companies use our applications and information to analyze private-company performance, determine the value of businesses, understand industry trends and assess the credit risk of borrowers. ProfitCents provides the largest real-time database of private-company financial statement information in the United States.

For more information, please email or call: profitcents.support@abrigo.com or 833-4-ABRIGO