This guide focuses on how to prioritize different session when working with implementing ProfitCents into your firm.

Initial Consultation:
- Get introduced to your primary consultant
- Tell us about your firm so we can help customize your experience
- Set appointments for ProfitCents training with champion users

Selecting Clients
- Set up clients in ProfitCents and create reports, as part of the initial rollout of ProfitCents
- Ideally, you would have 3-5 clients to start

Advanced Training Sessions
- Receive expert guidance on additional services and applications in ProfitCents not covered during initial training

Present to Clients
- Focus on learning how to present to clients (prioritize what your clients need to focus on first, and then decide which report will be most affective for that conversation)
- Discuss additional services you can provide your clients, and how ProfitCents adds value to their relationship with you

Follow-Up Appointments with Clients
- Based on your previous client presentation, follow-up on reports or additional services you discussed

Debriefing Session with ProfitCents
- Discuss feedback from clients
- Discuss any reports or details that need explanation
- Decide on additional clients to target with ProfitCents

Progress Tracking and Goal Monitoring
- Create internal tracking system and client management system
- Identify opportunities to engage with clients

TIP:
Identify a client that you are most comfortable with. Discuss ProfitCents with them, and ask them for feedback of what ProfitCents has added to their value in working with you. Use them as a referral or case study for your firm's own benefit.

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