



CASE STUDY



Jirav Empowers Founder's CPA to Scale Strategic Advisory Services and Generate New Revenue

+6 figures

New annually recurring revenue

New clients

Able to provide comprehensive outsourced CFO services to attract new clients

Founder's CPA is an innovative firm that provides accounting services to businesses ranging from pre-revenue startups to established small businesses. Headquartered in Chicago Illinois, the firm utilizes cloud-based technology to provide their clients with a full range of CFO services, from the month-end close to financial modeling and scenario analysis.

Challenge

The shift to advisory services in the accounting profession is being led by customer demand. Clients want accounting firms to provide business advisory tools and services, and leading firms are responding. Founder's CPA works with a variety of businesses and required an FP&A tool that would help the firm provide advisory services to every one of their clients regardless of industry or stage of growth.

Curt Mastio, Principal at Founder's CPA, also needed a solution for advisory services he could integrate into the firm in an efficient and scalable way. The first cloud-based financial planning tool Curt tried didn't work out. He was frustrated by the tool's user interface and struggled to implement it in his firm. "It was clear that the tool was designed by engineers not accountants," says Curt. After scrapping his first attempt at implementing FP&A software, Curt decided to give Jirav a try. According to Curt, the Jirav solution was "easy to navigate" and seemed like it was built with business people in mind. Jirav's feature set scaled well across the Founder's CPA client list, which ranges from pre-revenue startups to those with over \$35 million in annual revenue. The platform offered value to every client while still being complex enough to handle the financial modeling and scenario planning workload of his bigger clients.

Challenges overcome

- Using a different budgeting and planning application that was too difficult for the team.
- Needed a way to provide a comprehensive, outsourced CFO solution to startup clients.

Advantages delivered

- Utilized Jirav to generate six figures in new CFO services revenue annually.
- Jirav platform adds value to clients at any stage of business growth.
- Monthly reporting packages provide tangible value to prospects in the sales process
- Allows for standardization and scalability of CFO advisory services



Opening the door to new business opportunities

With Jirav on his side, Curt can offer his customers state of the art business planning and advisory services, adding value to Founder's outsourced CFO offerings. This has allowed Curt to grow his business every year, and gain and retain more clients. "We were able to generate over six figures annually in new business thanks to Jirav," says Curt.

Tangible value in the sales process

Curt has been able to attract more clients than he would have otherwise by integrating Jirav into his sales presentations. Jirav allows Founder's CPA to visualize the results of their monthly accounting services with attractive cloud-based reports and dashboards. "I started implementing Jirav as part of our sales process to show that not only can we provide that back office, but we can also be in the room to provide more information when you are making critical business decisions," says Curt.

An FP&A solution for large and small clients

A common problem with most FP&A software is that it's either too difficult to use or too expensive to use with every client. But Jirav is different. Curt can use

Jirav for all his clients regardless of size or funding stage. Smaller clients benefit from KPI dashboards and customizable financial reports. Larger businesses take advantage of the sophisticated driver-based budgeting and planning features. Jirav can grow with growing businesses as their planning needs get more complex. "Giving companies in the smaller business space the extra visibility in an easy to understand format and way provides a lot of value," says Curt.

Scaling CFO services while saving time

A big challenge of growing an outsourced CFO service line in an accounting firm is managing time. Jirav's cloud-based automation lets Curt and his team save time, allowing them to spend more of their time with clients while continuing to grow. "We are definitely saving time. It makes the advisory services of an accounting firm scalable as one person can do more," says Curt. With Jirav, Founder's CPA has been able to elevate the firm's outsourced accounting offerings. The powerful (yet digestible) FP&A solution enhances the advisory services Founder's can offer their clients of various sizes and has enabled Founder's CPA to develop business while simultaneously spending more face time with their long-time clients.



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CURT MASTIO
Principal, Founder's CPA

